Print and Digital Research Forum’s Symposium
Nice, France
13-16 October, 2013

Edited Transcripts
of discussions during the Symposium

November 2013
This document is a record of what was discussed at the Print and Digital Research Forum’s symposium in Nice in October 2013.

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# Edited Transcripts
of discussions during the Symposium

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SUNDAY 13 OCTOBER 2013

OPENING

WELCOME:  Dawn Mitchell, President

PROGRAMME CHAIRMAN’S OPENING:  Scott McDonald

GUEST SPEAKER:  Professor Philip Napoli

THE PRESIDENT:  Good morning, everybody.  This is a wonderful moment for me because you are all here safely, everything seems to be working, and we are right on time, which is great.  Are you all wifi’d up?

When we contracted with this hotel it was not a Hyatt hotel.  It was about six months or a year later that the management contract was taken over by Hyatt, and the new management is thrilled to hear that we, in a way, have come back home to Hyatt, because the very first readership symposium, the famous New Orleans Symposium that people refer to, was carried out in the Hyatt Hotel in New Orleans over 33 years ago, and I think I’m not the only person in this room who is a veteran of that conference.  There are several people I recognise here who were together at that very first conference.  We had 84 delegates, and those of us who were there I think could little imagine that 30 years later we would still be working in media research, still fascinated by the subject against an ever-changing marketplace and ever new problems to be solved and discussed.

That very first symposium was an initiative of two competing British research companies, BMRB and Research Services.  The fact that two competing research companies came together to try and improve the work that we were doing is still the motive of this Symposium even today, that people who are in competition nevertheless come together to share and discuss both their successes and their problems in a collegiate way, and I hope you will all participate in that spirit today.

I have to say a couple of thank-yous, most particularly to our sponsors, Kantar Media and Ipsos MediaCT.  Their distant ancestors were BMRB and Research Services.  The names and the ownership have changed over the years but it is the same people who have supported this symposium for the last 30 years, and without their support, especially in these very hard economic times, we would not be able to hold this event here today.  So thank you very much to our sponsors.

Andy Brown of Kantar Media and Richard Silman of Ipsos MediaCT will be chairing two of our sessions later today.

There are just one or two housekeeping points we need to make before we start.

Speakers have their allocated time.  If it looks as if they are coming to the end of their time and they are likely to overrun, the moderator will give a little “ping” on the bell.  If they then really overrun the ultimate sanction is they will get a longer bell and everything will be switched off, so just to warn you, you will have a countdown in front of you!

The next thing is that all the discussions will be recorded and when they are transcribed they will be put up on the website, so you will have a permanent record for those who are present of all the discussions which took place.  Didi is sitting down there right now and transcribing what I’m saying, and she will transcribe all the discussions.

Please feel free, everybody, to participate in the discussions.  When you want to speak put your hand up and somebody will bring the microphone to you once the moderator has pointed to you.
Can I really emphasise one thing? Please, first of all, say your delegate number and then your name. Our trusted AV team comes from the Czech Republic and they can do everything except understand some of the pronunciations of some of the names, so the numbers are the most important thing so that your name can go up on the screen the moment you are asking a question or making a comment.

The other thing is there is the traditional voting for the best papers at the end of the symposium. We will have the traditional prize for the best technical, the best presentation, et cetera, and what we are doing this time, in order to try and eliminate the order effect, is that we are going to take the vote for each day at the end of the day, and those votes will then be collated and weighted, and at the end of the symposium we should have a winner, or six winners, that will be announced on Wednesday night at the awards dinner.

When you get this questionnaire at the end of each day there will not be a nomination for the best newcomer, because the best newcomer will emerge. We know who are newcomers and that will emerge from the other prizes. So if you are a newcomer, you do have a chance of winning a prize, even if you are not on the questionnaire.

Lastly, I would like to introduce our Programme Chairman, Scott McDonald. He has been creative and has worked tirelessly on this for the last two years, an inspiration to all his Programme Committee, but he is also a very hard taskmaster. You have 55 papers in four days and particularly on Wednesday, which is the last day, you will probably be feeling very tired by the end of the day, but I think it is a very worthwhile programme.

I would now like to hand over to Scott to take over and run the proceedings.

Thank you.

SCOTT McDONALD: Good morning, and bienvenue to Nice. What Dawn has neglected to say is that I have now reached the apotheosis of research fame -- I have become a password!

I hope you all had good travels and are excited to continue the conversation that began in 1981 in New Orleans and that we engaged together most recently two years ago in San Francisco. We have a very jam-packed schedule, 55 papers as announced, to cover over the next few days, and those proceedings will include not only paper presentations but discussions and debates, hopefully spilling out into the social parts of the programme as well. There are a number of social occasions and opportunities to take advantage of this very beautiful location on the Côte d’Azur.

As is usual, our programme follows the contours of the industry. Since newspapers and magazines are now not just print media but multimedia enterprises pursued on different platforms and on multiple devices, we continue to struggle to develop measurement and evaluation approaches that reflect that ever-increasing complex reality, scaled at the same time to the needs and economic resources of the media economies in our various home countries.

Since the advertisers now not only expect but demand that we build campaigns of increasing complexity across all of those consumer touch points, we continue to seek the means of fairly allocating credit, not just to the last click, but to all elements of a campaign’s contributing media, any of the media that would have contributed to the success and marketing outcomes.

Since our audiences continue to evolve in response to changes in technology and to that complex media eco-system and find ways to anticipate, we continue to study the shifts in their behaviour and the psychology and find ways to anticipate and reflect that complexity in our media planning methods.
I would say all of those issues were with us when we last met in San Francisco and they are very present in the programme that will unfold over the next few days, so there is a lot of continuity and at the same time some very new developments to tackle this year.

The growth of interest in the potential of big data has shifted a lot of the thinking in our profession, challenging our traditional reliance on random samples and on classical Gaussian statistics to analyse those samples. This has propelled new thinking about data integration techniques and the application of Bayesian statistical approaches for the analyses and approaches that a company knows.

The limitations of cookie-based web advertising measurement systems has become much more apparent since we met in San Francisco and this is, of course, partly because consumers have found ever-increasing ways not only to delete cookies but to install software that thwarts them at inception, while increasingly accessing our websites from a dizzy array of new mobile devices where cookies never worked in the first place. So in our fundamental efforts to be able to measure exposure across this very complex landscape, even as we get better and better at it, new holes and blank spots open up that challenge any kind of coherent 360 view of consumer possibility of exposure to advertising.

Studies over the last two years have documented to a shocking degree -- shocking to many advertisers at least -- the degree to which online ad campaigns, even those that are built on the foundations of supposedly precise behavioural targeting technologies, have failed to find their targets, and as a result advertisers are now clamouring impatiently for a solid measurement, a viewable ad impression, and they demand that publishers provide guarantees on that basis, a subject we will explore in some detail on Tuesday morning.

At the same time, these ubiquitous mobile devices are providing newspaper and magazine publishers with a very new kind of visibility into at least some of the elements of the reading process, views that were heretofore impossible to get when we were only dealing with ink on paper and only beginning to get a glimpse of two years ago, but that now we are beginning to see in much greater detail. From my perspective we have a lot of continuity that carries the themes of this conference from subjects that we have been wrestling with for many years to a whole bunch of new stuff that is quite challenging and interesting, which I think will keep us all rivetted for the next many hours.

Our symposium mirrors our industry. It is a picture of continuity and change, of technological disruption and of ecological adaptation of publishers, advertisers and measurement companies, and it turns out that this process of ecological adaptation is the subject of a study by a scholar in the New York area, Professor Philip Napoli, who wrote a very excellent book that I would commend to all of you. He wrote it last year and I got around to it this summer, so in a break with our usual practice I have invited Professor Napoli to join us this morning and deliver a keynote address, drawing on this remarkably perceptive and lucid account of our collective enterprise in this book entitled “Audience evolution: new technologies and the transformation of media audiences”, published by Colombia University Press.

Sometimes it takes an outsider to, in effect, see the forest for the trees, and I think that Professor Napoli’s book does a very nice job of adjusting the trees:forest ratio, allowing us to perhaps get new insights into our collective enterprise. He has done his homework; he has spent some time doing research for the book attending media conferences -- unfortunately not PDRF up to this point but ARF and ESOMAR meetings and other industry gatherings -- and he has bothered to read a lot of the literature. In fact, I think many of you will be pleased and surprised when you look at his book to see the degree to which he has taken advantage of our website, downloaded our papers and cited many of you, so your work is not only the foundation of the analysis that Professor Napoli provides but you also at some point get that peculiar feeling that you are the object of his study and you are the ones being researched.

I hope that his address will get us off to a stimulating and provocative start. With that, I give you Philip Napoli. He is presently Professor of Fordham University Business School and soon to join the School of Communication at Rutgers University.
PROFESSOR PHILIP NAPOLI: Thank you, Scott, and thank you to the Programme Committee for inviting me out here. I can’t remember how I slipped past the password protections to get access to all the papers for the previous PDRFs but yes, they are very useful for me in the work that I do.

I had prepared a presentation but then I thought maybe I would just talk about the 21 hours it took me to get here yesterday. Then I realised I could boil that down to a simple lesson: before you go to the airport make sure you have your current passport and not your expired passport. The whole process gets ugly after that. But in any case, thank you.

I’m a social scientist and enjoy studying the marketplace for me -- audiences. I have been doing that for a number of years, so I study at least in part you folks, the research you do, the constraints under which you operate and how those change over time, the conventions that are adopted and institutionalised and, of course, particularly important these days, the technologies that you use which impact how you are able to gather the information that you gather. Usually when I am at an event like this I am doing more participant observation than giving a keynote, so I’m a little bit nervous and I am going to be telling you things I have learned really more about the environment in which you work, but for me too especially, which is such a fascinating aspect of this marketplace, as someone who comes from a social science background, the very currencies which these industries have operated with are socially scientifically produced, or at least they traditionally have been.

For me, a framework that I find useful when thinking about this marketplace is this notion of market information regimes, which is this idea when we talk about measurements not only of audiences but universities operating under the same kind of market information regimes in the form of our US news and world report rankings and things like that. It is this regularly updated market activity, provided typically by third parties, that really provides the foundation upon which all participants in a market form their cognitions of not only how they are performing but how their competitors are performing, et cetera. A lot of folks who study audiences talk about this idea of markets and this sort of information being social constructions and that is a theme that will underlie a lot of what I talk about, but, of course, a lot of things can be socially constructed. As I said, what interests me is the way we are talking about a regime that really is genuinely socially scientifically constructed, or traditionally has been.

When you use that terminology, “regime”, it suggests something important as well, which is this idea that issues of governance and shifting power dynamics are really central to how a marketplace functions. This is particularly the case when you are talking about the marketplace for media audiences.

One other useful notion that I rely upon is this idea of what we mean by an institutionally effective audience. This is what interests me the most. How is it that an audience becomes useful to everyone, defined and conceptualised in a way that everyone can share and upon which all the necessary conventions of a market can function? When we are talking about institutionally effective audiences we mean essentially audiences with a set of established practices or patterns and conceptualised by media organisations, advertisers, audience measurement firms, media buyers, et cetera. Of course, what has been interesting about these recent years is the way this process is becoming destabilised a bit, and the fact it will inevitably reformulate, so to speak.

I have done a couple of books in this area and, as the magnificent clip art cover will tell you, apparently my publisher does not think you people have a large market; there is not mass appeal for the study of the audience marketplace. This is a true story. The first book was published in 2003 and, as an academic, you are never supposed to complain about your cover; you are just supposed to take it and say “The more boring the cover the more rigorous the book is”. That cover came back originally with those two clip art people sitting in front of a TV with rabbit ears and I said, “Come on, people,
you can’t put rabbit ears on a book in 2003”, so their graphic design wizards turned that TV into a chart -- and voilà.

By the time the next book came out I said, “My wife’s a graphic designer. Maybe she could do the cover,” and they said, “Oh, no, we don’t want to deviate from the theme that we set with the first one”, so we did two horrible covers. I am still bitter about that, as you can tell!

In “Audience Evolution”, which is the more recent book, I was really interested in how technological changes are impacting, how media audiences are conceptualised, measured, valued, and monetised. How is this institutionally effective audience essentially evolving? The central element of this book is this idea that essentially the process of audience evolution is driven at the core by two interacting sets of changes. That should really be transformation of media usage rather than consumption, but that is the way in which technologies are facilitating new forms of interaction between consumers and media, whether it is greater interactivity, greater opportunities to create user-generated content, greater abilities to delete cookies -- all these sorts of things that can impact the nature of consumers’ interaction with media. Interacting with that is the development of what I call audience information systems, new ways of gathering information about audiences, whether it be all the ways that mobile devices and interactivity of the web are facilitating new information sources, or the more traditional media spaces, things like the development in fairly recent years of portable people meters and things like that in the television space.

This is also another sphere of ongoing technological change, but the one thing I try to emphasise in the book is that we can never be technological determinists, to use an academic term, in this space. These two sets of technological changes are always operating within this environment of what I call stakeholder resistance and negotiation, and the end result of that is that very often technological change never is as dramatic as the technology would allow.

My students are always amazed when I’m telling them these days, for example, in the television context about all this controversy surrounding the hopper, which is the DVR that one of the satellite companies is providing that allows for the ability to genuinely skip commercials, as opposed to having to fast forward commercials. That was part of the very original TiVo, now going back 15 years, which was essentially disabled back then in order to appease certain stakeholders in the television industry.

So these processes, the technologies that can dramatically change how consumers use media, can be slow, and sometimes they can go in different directions than was initially planned, and a lot of times particular stakeholder dynamics, whether from within the industry sector or legal or regulatory arenas in some cases, can have an impact.

The same holds true when we talk about audience information systems where certain stakeholders can, in fact, influence the direction in which certain technologies or systems evolve. Certain capabilities might go unused or, at the very least, the process might get slowed down much more than might have otherwise taken place.

We also have this idea that there are all sorts of forces that can limit or re-direct the direction in which these sets of technological changes might have otherwise gone. Out of that process emerges a new, eventually agreed upon institutionalised conceptualisation of the audience, but that process can take quite some time.

One of the key points of the book is that you must have both, that is you must have simultaneously these sorts of transformations in the dynamics of media usage that are undermining traditional, established conceptualisations of the audience and, at that same time, have the ability to address that problem via the availability of some sort of new audience information systems. If you have one without the other then you are really not going to see this process of audience evolution taking place. One of the examples I use in the book, again drawing from a television example, is a system that was launched in the 1980s called Television Audience Assessment. That was revolutionary in that it was
linking exposure with people’s appreciation of the programming that they were watching. It was available for a few years and didn’t attract the necessary support, even though it was widely thought of as an improvement over the status quo, but at the time my take on it was that it was essentially proposing a solution to a problem that no one really felt was a problem. Now, of course, with the environment being very different, the reaction could have been very different, so that interaction is key to this process of audience evolution.

By the same token, if there is a problem with the status quo but no obvious solution or potentially viable solution available, for the market to function efficiently it will continue and everyone will agree to treat the status quo as the norm and accept its shortcomings.

This slide is my effort to take this notion of what I call “audiencehood”, the process of being an audience member, and break it down into its component parts almost as a sequence, starting from awareness and interest, moving through exposure, into this much more complex realm -- I don’t know if I have captured everything, by any stretch of the imagination -- of the various things that have fallen under this umbrella concept of engagement. At the time I was writing the book the fundamental topic of debate was what the heck engagement was going to mean, but that seems to have fallen by the wayside a bit.

I have tried to represent the fact that traditionally concepts like attentiveness and loyalty, which we can think of in some ways as measures of engagement, were very often derived from measures of exposure. The idea is there are all these various parts essential to what being an audience member is but that for quite some time all of the value -- that is, all the concept that drove the value of audience -- was locked into that core dimension of exposure. Of course, we need to recognise that being part of an audience is much more multi-dimensional than that and one of the things I talk about in the book is I go back to really the 1930s, when exposure was agreed upon to be core currency in all these different media sectors. Today when we look at essentially the forces that are moving towards what I call a post-exposure audience marketplace, we see forces in each direction, so there are all these forces that are pushing the marketplace to start looking beyond exposure.

One of the things I talk about in the book a fair bit is what I call “audience dark matter”. I think about the only thing I learned from my freshman astronomy class is this idea that there is all this matter out there, we know it is there, but we can’t measure it or see it particularly well, and in the audience space, whether it is television, magazines or online, we know most of the existing measurement systems are only able to capture a portion of the overall amount of audience activity that is taking place. Not all magazines get measured, certainly not all websites, and in television it is only about 80 or so of the 500-plus networks that have regularly reported Nielsen ratings. The list goes on but certainly, as that amount of dark matter grows, it creates incentives to start looking into alternative ways of thinking about audiences, which is where we move, for example, into things like various types of engagement metrics, which are really at their core efforts to compensate for or move us beyond the diminished capacity of exposure to reflect the full value of the audience.

At the same time there is, of course, a wide range of ongoing effort, and you are going to see a lot of that in some of the talks in the next few days, to try to maintain and almost rehabilitate and preserve traditional exposure as the key source of audience value, whether it is larger sample sizes or, in the TV space, set-top box measurement, or the various forms of cross-platform ratings and five platform measurement systems that are being developed. These are the kinds of opposing forces that are at work right now in this marketplace.

I have modelled it on the idea that exposure really does remain at the core of how we think about audiences, but that its overall prominence has been on the decline and all these other potential approaches to valuing and measuring audiences are emerging as supplements, for the most part. Although the book only came out a year or so ago the way publishing works it was actually two or three years ago that I finished it, but the process from it being done to it being in print takes a while, and of course -- and Scott mentioned this -- one of the key trends that has emerged since I completed
the book was this emphasis on various forms of big data analysis and how that can become incorporated into the institutionally effective audience.

What I find interesting about this is, to me, this is now one of the fundamental tensions in this marketplace because, coming at it from a disciplinary perspective, it is a shift from an approach to an audience based traditionally and primarily in social sciences to one that is now more based in computer science, so it is one of the first major disciplinary shifts in how we think about audiences really since the 1930s.

This gets to issues about the importance of representative samples; issues of how much transparency should be expected in understanding how audience measures are calculated. It creates, at least at this point in time, fairly large information asymmetry, that is a big gap between what the producers of the audience measures and what the consumers of the audience measures know about how these measures are produced. I think that is becoming an important source of tension.

In a lot of the interviews I do there are two terms that keep coming up more than any other. Black boxes and secret sources. I guess those are industry terms. I think I have a handle on what they mean but, again, I keep hearing, “Well, we don’t really know what is in the black box, we don’t really know what is in the secret source”, so it creates an interesting new vocabulary in this field. Certainly these were not terms that were emerging in research I was doing ten years ago.

It is important to recognise that sort of disconnect and that the asymmetry in information is a function of a couple of things. One is the issue of basic complexity. One of the things I have learned in some of the research I have been doing recently as it relates to social media analytics is, even if you are interviewing senior executives in some of the firms that do social media analytics, they can’t tell you how their product works. Really it is only a select few people in these organisations who really know the granular answers to questions about how measures are calculated and computed, so there is that basic complexity and difference in skill sets, background and training.

Constructing algorithms is a very different process to constructing samples. Of course, there is also the issue of strategic concerns and especially at this point in time, when we are in this gold rush, wild west stage in the development of big data analytics, there is a huge strategic imperative to keep some of the most important aspects of what you do proprietary. But in any case it is a different point in time, because there is this cultural shift.

I have been working on a text book of late on online audience measurement and collaborating on that chapter with someone from Google and an old school survey researcher from Nielsen, (who was my Professor of Survey Research when I was in graduate school so someone for whom samples were his life blood), and someone coming at this from a very, very different perspective. I think they asked me to collaborate because I was supposed to be the referee between these two, between the guy who thought anything that wasn’t based on traditional representative samples was garbage and someone who thought that was an incredibly limited way to think about how to gather usable data. So I had a front row seat to some of these conflicts just within the context of writing that chapter.

Anyway, I wanted to put this in a bit of historical perspective.

This slide shows George Gallup, a name we all know, of course, as a pioneer in survey research, but what some people don’t know is George Gallup had a very significant audience research career as well. His dissertation was on measuring newspaper audiences, and he was a pioneer in motion picture audience measurement. I bring him up because he represents the point in time when social scientific thinking was first being imposed on to audience research and audience measurement. It is interesting if you go back in time to see how much resistance there was to this way of thinking, whether it was in the newspaper context -- and we see some of that to this day -- where newspaper editors operated under the mindset that knowing what audiences wanted and making decisions on that basis was exactly the opposite of what a newspaper editor was intended to do. A newspaper was supposed to
provide people with information that the editors thought they needed and not really make any decision on what audiences told them they wanted, so there was a real organisational culture difference there. In the motion picture case it really did run counter to a more intuitive model of thinking about how to assess the quality of the market prospects for individual films. It is best represented by a quote from Harry Cohn from Colombia Pictures, who was the Chairman from the 1930s to the 1950s: “When I’m alone in a projection room I have a foolproof device for judging whether a picture is good or bad. If my fanny squirms, it’s bad; if my fanny doesn’t squirm, it is good”! Not exactly social science obviously, but that was the environment into which these more systematic approaches to audiences were entering.

It is interesting, especially with motion pictures, that it really wasn’t until late 1970s/1980s that the notion of systematic approaches to audience research really became institutionalised into the systems that are in place today.

Here is another example, Paul Lazarsfeld, another pioneer in the world of audience research, and probably even to this day the prime example of an academic who has collaborated with the audience measurement industry in a rigorous way. There has never been anyone like him since in that regard. He began his collaborations with the radio industry and, as some of you may know, their earliest approaches in audience research were to weigh the fan mail, so if you had a show and you got two pounds of mail that liked the show and five pounds of mail that didn’t like the show -- well, there you go, that was your audience research. Of course, that doesn’t tell you anything about what you might call the silent majority, the folks that are consuming and aren’t sufficiently motivated for whatever reason to write any fan mail.

To me this story sounds awfully familiar. It reminds me of what we are seeing happen in the social media analytics space, where obviously a tweet now is becoming incredibly valuable. Every time you tweet you are creating data, and if you are not tweeting you are part of the great unmeasured, but the question there really depends on to what extent those data are going to contribute to decisions that are in any way meant to take into consideration the entirety of the audience. He had an interesting quote way back in 1947, again an example drawn from radio: “Questions of preference in radio research have been almost discarded in favour of actual listening figures, but this is not necessarily the best solution. It may be just as important to know that a person likes a certain programme”. It is interesting that essentially he was collaborating with marketers, with audience researchers, with media organisations, and the direction that the evolution of the institutionalised audience took was very different from how he thought it should go.

If you look at a lot of his early radio research it was all about preferences, but the direction that became institutionalised was one where the focus was purely on exposure.

The Gallup and the Lazarsfeld examples are important and show us a couple of things. One is that this process of audience evolution can take a very long time, that is, it can take a very long time for the institutionalised conceptualisation of the audience to change in response to new technologies, new analytical tools, et cetera, but the other part that is interesting is that essentially paths not taken decades ago can, in fact, re-emerge as paths that we might end up taking now. So a lot of what we have seen in the past decade has been a return to what Lazarsfeld thought we should have been doing in the first place, going beyond basic exposure and capturing a much broader range of the concepts that are relevant to how we understand audiences than we traditionally have.

Now, in the end, as we are entering what I call the era of the algorithmic audience, if and how this becomes institutionalised remains to be seen, but it probably won’t happen quickly and it probably will be fairly contentious. To me it represents the first major shift in the disciplinary underpinnings of audience research that we have seen in 70 years, so it is obviously a very exciting time to be watching what is happening.
Thank you very much. If you ever are interested I am sort of dormant these days, but there is lots going on lately that has me interested in getting back to blogging on some of these issues.

Thank you.

**DISCUSSION – Opening**

**SCOTT McDONALD:** I could start myself by going back to your complicated flow chart with exposure at the centre of it which implies, at least in my reading, that exposure is perhaps sequential, a necessary but not sufficient condition for evaluating the quality of audiences. This is something that we in the magazine and newspaper media certainly have wrestled with a lot in the last several years, because the advertising market online is extremely commoditised and sold in bulk impressions. An impression is an impression even if the standard moves to viewable impressions. It is a filter on that but it is still primarily an exposure measure, and the debate about how to capture engagement has been much more ambiguous and impressionistic, has significantly less consensus around it and, because of the technological challenges, is a two steps forward and one step back process. I feel it has maybe been one step back in the last two years because exposures themselves have become more problematic rather than sure, at least in online measurement and in integration of online and offline platforms for print measurement.

Do you agree that engagement necessarily follows exposure, or do you see a way of pursuing both of those separately? Your book seems very bullish on engagement but, as you said, it was prepared during a time when perhaps we felt more confident than we should have about the progress we were making on studying exposure.

**PHILIP NAPOLI:** As you point out, it is a necessity. What we are really starting to see is a two-tiered model which depends on the content provider. If you were a content provider in the long tail, so to speak, you are going to try to figure out a way to monetise your audience’s engagement because that is what you have. Those providers who are fortunate in still having viable exposure numbers to monetise will continue to operate on that model as long as they can. That is what I actually found in some of the research I did in the wake of the book, that there really seems to be these two classes of audience markets developing. I don’t know whether that reflects what you guys are seeing, which is that that engagement becomes almost like a second-tier currency. You wish it could be selling exposures but ...I was doing some research in the realm of social media analytics and the thing that kept coming up was this idea of what story we had to tell. We don’t have the exposure story so we tell the engagement story. As a researcher, you always hate to hear notions of research being integrated with notions of story telling, you don’t like to think you are just making stuff up, and story telling creates that impression. What they mean is what is the compelling case that can be made?

What is interesting now, though, is that there are data tools available to make a variety of different kinds of compelling cases, which is in some ways kind of exciting, this idea that there doesn’t have to be one criterion for a value in the marketplace, because that could stimulate or help create a support structure for a greater diversity of content. That is my take on it from my perspective, this almost two-tiered marketplace developing.

**HORST STIPP:** Building on your comments, Phil, what I find fascinating is that you have even within the same media organisation people who are responsible for different products making opposite arguments. One who is in charge of a very high rated, popular product will say, “We have to change our thinking, it has to be beyond exposure, we have to take engagement into account, we have lots of tweets”, but the people who don’t have the tweets will say, “Tweets are not representative, you should just look at the Nielsen rating,” and I find it interesting that if you have that even within the same organisation and between organisations that is something that is driving some degree of insecurity and confusion about the various metrics which, as you point out, used to be all agreed upon.
PHILIP NAPOLI: Yes. In fact I encountered that in a lot of the research I was doing, not only amongst content providers but even on the media buying side. It really does tend to map itself out generationally about what should be mattering in terms of how dollars are allocated, to the point of seeing bona fide hostility. “You guys are going to argue like this with me in the room? Okay, I will write this down!” But absolutely, it really is very different perceptions of value. I don’t know -- can a genuinely bifurcated model of the audience be tenable long term? Does that represent too much complexity, too much uncertainty, to genuinely operate under multiple value criteria? To me, that is the interesting question going forward.

ANDREW GREE N: Phil, thanks very much for that very interesting presentation. I also read the book and found it a really interesting way to look at how these debates are structured and represented, but there is a sub-point I was interested in.

You pointed out the radio research of the 1930s where you would weigh listeners’ letters who were in favour and listener’s letters who didn’t really like the programmes as a method of audience research, which was actually quite similar to TV research in China in the 1970s, where they would count viewers’ letters and that would be audience measurement for TV at the time. But there is another point today, going back to that debate you also raised about the sampling expert with the Google expert and how you reconcile those two -- and I am fascinated to know which book that is going to be in -- which is that today one of the big issues and challenges representing survey research of all sorts is response. In the 30s, 40s and 50s response to surveys was quite high but it is much lower now and still going down. What we have now found is that the samples which those core metrics of exposure are based on are actually a smaller and smaller portion of the population, and I wonder if they are not beginning to be a bit like those listener letters and viewer letters, which are “the interested” as opposed to the “great unknowns”. Are we in a Donald Rumsfeld situation here, where we have the known unknowns and the unknown unknowns? I wonder whether you have any opinions or views on how you mix sampling and non-sampling techniques into a hybrid measurement of those core metrics? It is a complicated question.

PHILIP NAPOLI: Yes, and do I have an answer? Absolutely not. That is for the people who really get to dig in with the actual data that I only very rarely get access to.

To me the example you bring up is very interesting, because one of the areas I have started to look at now is the area of politics, and we might be getting close to the end of the era where political polls are the way in which elections are predicted and candidates’ performance is evaluated.

It is interesting because you are weighing different categories of shortcomings. We have already seen this in the news media’s reporting on elections. They are reporting on social media data, and there is some evidence out there that it is a pretty darn good predictor of election outcomes. There isn’t necessarily the same kind of underlying theory at work there because you know it is not a representative sample of the population, but if it seems to work they are using it. That process of how to meld the approaches is happening but, as far as advice on how to do it well, I couldn’t tell you.

GEORGE IVIE: I’m with a little organisation in the US called the Media Rating Council, and right now we are moving forward a whole set of priorities on modernising digital measurement, and probably the first one and the most visible one we are working on is trying to at least make available a new currency called viewable impressions.

I found very interesting the construct that you had on the screen where you used the term “stakeholder resistance”, because we run into that from time to time. Right now in the viewable impression space -- but that is only illustrative; it happens all over the place -- we actually are passing out a couple of different issues, one of which is dealing with the change itself, so moving from served impressions to viewable impressions which is very different. You have to understand it, adopt it and figure it out,
so that creates a type of resistance which is just dealing with change. But underlying that, as Scott alluded to, there are also technical issues.

When we first started analysing viewable impressions after a different group proposed them we thought it was a great idea, so we started looking at it technically and we found out that in some cases, with less than 50 per cent of the impressions, you could even tell whether it was viewable or not, so immediately you have a technical issue and you have to hold up your hand and say until you can really figure it out maybe it is a little premature.

I found that section of your work fascinating. Have you ever parsed out the various types of reasons why there is resistance and how you deal with that? Because we are right in the middle of that space and that would be very useful knowledge.

PHILIP NAPOLI: The first part, type of resistance and how to deal with it, is a great question. I don’t think I have tried to answer it yet but I think there are issues. Resistance can emanate from so many different places. One is basic information overload issues, and we have seen that in certain contexts. There are folks who really don’t want the convention to move in a direction that poses these massive new data gathering and analysis obligations. There are the issues of incurring costs associated with adopting new technologies or, as we have often seen, with subscribing to a syndicated service. “I would like better data but I do not want to pay the costs for the upgraded technology”. So again we start to see these bifurcations by market size and revenue potential.

Also, which sometimes goes undiscussed, there are forms of resistance that can emerge from legal and policy-making circles. I did research a number of years back -- and you guys were deeply involved in this -- into all the controversies around the migration to the portable people meter and the local people meter and all these different markets that resisted that, and it became an issue that Congress, the FCC and the New York City Council got involved in, and there are also issues of representation of different minority groups and so on, so there is a larger social and political sphere that these things can spill over into as well and how best to deal with them is a tricky one.

JULIAN BAIM: I want to go back to the issue about what you might call the tension between the engagement metrics and exposure metrics related to print because of the advent of digital print editions. The argument for those editions right now is the wonderfully immersive experience that readers of those editions have and the potential to create enhancements that make it much more than what the printed edition ever was.

The problem that the publishers are running into, particularly in trying to sell advertising, is that you have the wonderful engagement metric but not enough exposure, so how do you reconcile justifying a medium based on engagement, when exposure levels are always brought up as an argument against the value of that medium?

PHILIP NAPOLI: In this marketplace what ends up happening is that it becomes a medium that is in that situation, or a platform in that situation ends up having to ideally find themselves a different set of advertisers. We don’t see uniformity, I don’t think, on the buying side in terms of what is being valued and what is not. What I tend to see happening is we are not able to attract those advertisers for whom their priority is certain base levels of exposure. You have to drill down into different tiers of advertising and I think that is what has made monetising online audiences so difficult. Most of the content providers aren’t necessarily providing something that we see.

One of the things I tried to represent in the audience evolution book is that we know there is that long tail model of how audiences are distributed, and if you graph the distribution of advertising dollars on to that exact same graph it is even more pronounced and you see a greater concentration of advertising dollars, a larger head, so to speak, in the distribution of advertising dollars than you even see in the distribution of audience attention. This says that a content provider in the position you are
describing tends to lose out and that advertiser will go where the exposure is, out of proportion even with the extent to which the exposure is located in other places.

HASTINGS WITHERS: Your comments about stakeholder tension and resistance reminded me of a comment that we, or many of us, will have heard in these rooms in the past year made by a publisher who said, “I really don’t care what the measurement system is as long as I know my competitor can’t nobble the results”.

I think sometimes we feel that Google might be able to “nobble” the results.

PHILIP NAPOLI: That is what fascinates me too now as I see so much emphasis placed on social media analytics in various spaces. I just cannot imagine the work that is going on right now on how to nobble those, because there seem to be so many opportunities to do so. When we look historically at whatever kind of measurement system we are talking about there have always been those sort of opportunities, as long as it is a level playing field in terms of everybody’s ability to do so, or a level playing field in terms of the way in which the misrepresentations are distributed. It is when the overall playing field starts to shift one way or the other which is the part I have always found fascinating, going back to the first part of that quote, which is they don’t really care what the measurement system is.

I thought you were going to say “as long as it makes me look better than my competitor”! That is what I have found interesting over the years. Efforts in some cases to really preserve a bad measurement system are so clearly motivated by “I fare well under this bad measurement system” or “I fare well under this particular flaw”, and it is always tricky then for the measurers because when they try to improve upon a system they are in a tough spot in terms of making their cases. They can’t say, “The thing we have been charging you for all these years stunk. This is much better”, and they can’t really get too aggressive in terms of admitting to the shortcomings of the old system. So it is an interesting set of constraints in which that sort of tension operates.

SCOTT McDONALD: I was going to ask you a question about that as well, because social media is such an interesting counter-example to the increasing reticence of audiences to co-operate with a formal survey. Andrew talks about response rates going down, and this is obviously a problem. Audiences are increasingly able to delete cookies, fast forward through television commercials, pay no attention to the banner ads around the periphery of the screen, and tune out commercial messages. On the one hand they have a lot of autonomy, but on the other they increasingly post all kinds of comments about themselves -- at least some do -- which means you don’t really know the difference between the frequent posters and the not frequent posters, but you end up with information that could be analysed if you don’t worry too much about the representativeness of that.

Every single magazine of my company has people on the staff dedicated to trying to whip up the social media, so it is an arm of public relations, a promotion activity to try to get more chatter. Who knows the degree to which that is successful or manipulable? It is an odd bit of material to use as the cornerstone for something that is trying to evolve into a currency, or at least an adjunct to media currency.

What is your feeling about the prospect of social media taking that role eventually?

PHILIP NAPOLI: I think what is interesting right now is, as a whole, as a broad generalisation, various industry stakeholders are still grappling with, are they going to use that, is its function first and foremost as a driver of exposure, a means to an end, or a valuable end in and of itself? To some extent the decisions that advertisers and media buyers ultimately make about its value will determine that, because I see both happening right now.

When I think about Nielsen recently launching the Twitter ratings with Twitter the focus seems to be, at least on the research side, what evidence there is that it drives ratings, which is very interesting.
When I was doing research with some of these social TV analytics firms a few years back they entered the marketplace with the hope of displacing Nielsen, and then over time while I was doing this research, it became “We just hope we get bought by Nielsen”! In this relatively short period of time that was an important transition.

How advertisers decide to value that kind of information will determine whether it is seen just as a means to an end, and also how much the research ends are bearing out on that. If we end up with five years of research showing that social media activity is merely a reflection of exposure rather than being able to function as a driver of exposure, then all it is is a proxy for exposure -- and we are awash in proxies, right? Who needs another one?

So that becomes the primary way of capturing exposure and we give up on sampling and everything else, but to me that is the key question going forward. Is it a means to an end or a valuable end in and of itself?

DAWN MITCHELL: Phil, I really enjoyed your book. It was good bedtime reading –

PHILIP NAPOLI: Did it put you right out?

DAWN MITCHELL: -- so I have a small commercial. We do have 25 copies, so the first 25 people who would like a copy at the very special price that Phil has given us can get it on the way out. The question I wanted to ask is that quite a bit of the book explains very clearly how the consumer is taking control. What effect, I wonder, will this have on this great proliferation of social media, etcetera? We interviewed them, right from George Gallup onwards, as Andrew says, and until now got very low response rates. To what extent will they interview us, and in what way?

PHILIP NAPOLI: I don’t know that they want to interview you as much as yell at you. One of the things that has been fascinating to me of late is all the policies around user comments and essentially how to manage these new feedback mechanisms. It is one thing when it is on the social media space, but when it comes right to your site it creates a whole different set of challenges and they certainly have more means of providing feedback.

I don’t know that the audience, broadly defined, seems to want much information from us the way we wanted information from them, but they certainly have a lot to tell us.

DAWN MITCHELL: Will they determine the way in which we can collect information in the future, do you think?

PHILIP NAPOLI: I don’t think so. What I’m seeing is that, as audiences how much we care about our personal privacy online, is getting less and less and generationally it is dropping and dropping. Certainly the willingness to provide that information seems to be growing and if our policy makers haven’t really been particularly aggressive at this point in time in terms of putting in place regulations that limit the kind of data that can be gathered, I think any compulsion of that type will shrink as time goes on. That would be my guess.

LESLIE WOOD: You were talking about working with Twitter and Nielsen to measure how audiences are driven by social media, but that service isn’t being created because they want to find out if audiences are being driven by Twitter; it is being brought to market because we are seeing it is being driven by social media, and we also see that audiences are not just being driven by social media but by other media as well, so you see a digital ad sending people to TV and a TV ad sending people to digital online. Lots of cross-behaviour. Traditionally it was push, but it’s definitely not push. There are a lot of conversations around all media and how they are driving each other, so it is not that the evidence doesn’t exist but it is substantial enough to mean that you need a measurement service to quantify the value there.
PHILIP NAPOLI: The significance, if I’m understanding the research thus far, is that it is relatively small and tends to be limited to the earlier parts of a programme’s lifespan. I don’t think we have all the answers yet about this relationship by any stretch of the imagination, but certainly there was enough to merit continuing forward on this. In your assessment, what role should it play in how advertisers allocate their dollars, if any, or programmers? What does the relationship create? An imperative to try to goose the amount of tweets associated with each TV show.

LESLIE WOOD: It is not just at the beginning that we are seeing this; we are seeing this throughout a programme. There is a lot of discussion about what is happening in a programme, and it does not have to be just at the beginning of a programme or at the early stages of a series. The more loyal the following the more tweeters there are to a particular programme and the more conversations. You see it in sports and enormous event-type activities, where people are saying “Thanks for reminding me this show is on now”. What it is actually doing is taking people and creating more live viewing versus postponed DVR viewing, which is fascinating, and I don’t know that we know what the implications are to business. It is not that we are not sure it doesn’t exist; we can see that it is substantial and that it is going to be moving more and more in that direction.

SCOTT McDONALD: With that we can close this opening session, and I would like to thank Professor Napoli once again for coming to join us.
SESSION 1. ADAPTING TO CROSS-PLATFORM
Moderator: Andy Brown

PRESENTATIONS:

01. THE NEW SWISS NRS: FIT FOR THE FUTURE.
   Jella Hoffman and Harald Amschler, WEMF

02. AUSTRALIA: BUILDING A 21ST CENTURY READERSHIP SURVEY.
   Andrew Green, Ipsos MediaCT and Heather White, Newscorp Australia

03. IS A MULTIMODAL PRINT & DIGITAL NRS RELEVANT?
   Gilbert St Joannis and Nicolas Cour, Audipresse, and Françoise Dupont, CESP

04. 3 X NEW -- MAGAZINE RESEARCH IN NORWAY.
   Ingvar Sandvik, TNS Gallup, and Adina Broady, Aller Media

05. PRINT PLUS: MEASURING DIGITAL PRINT PLATFORMS.
   Irena Petric, NOM, and Alke Bassler, GfK Intomart.

06. DIGITAL EDITIONS: MODELLING REACH AND FREQUENCY.
   Julian Baim, GfK MRI.

DISCUSSION (Presentations 01-06)

GUY CONSTERDINE: I thought we had a superb array of papers on issues that apply, I should think, to all of us, and are of great interest on that basis.

I would like to focus on the question of estimating the net reach for a magazine publisher of print and website platforms for which, of course, it is crucial to get the duplication between the two correct.

There are two main ways of estimating this: one is through fusion, which, for example, the Australians are using, and the other is single source, which the French are using.

I’d like to ask Heather and/or Andrew if you have had the same experience that we have had in the UK in fusing comScore with the NRS, namely that, with the small sample sizes of magazine online audience being basically swamped by the much larger numbers of newspaper online audience, the fusion is underestimating the duplication for magazine brands, with one or two exceptions, and thus not getting the net reach correct. Quite seriously, in the view of the publishers, underestimating the duplication. Have you found that? Are the publishers satisfied with the duplication levels you get between print and online?

I’d like to ask our French colleagues who are using single source, which will get the duplication right provided it measures the online audience accurately, did you have a debate in France about recall being a problem in measuring website audiences accurately? Are you concerned about the questions asked by the Australian team in your considering using fusion? I would also be interested in any of the other speakers’ comments on this.

HEATHER WHITE: That is a very interesting question. So far, because we have had passive measurement as well as fusion measurement for both magazines and newspapers for part of our fusion hooks, we have been checking those things very carefully and looking at those two things together and the publishers are quite satisfied in Australia.
We have a relatively large sample size in terms of our fusion panel that we have with Nielsen relative to the size of our population. We only have 20,000,000 people and we have a 7,000 panel from Nielsen, so that gives us probably a little bit more room than maybe happens in many other countries in terms of the sample, so to this point it is looking okay. What we will have to see is how this looks in the future.

One of the problems is more that some of our smaller magazine titles don’t get anything on the Nielsen data, so the big titles are fine but it is the smaller ones that, even though they do have an online presence, that is an issue. That is one of the things we are working through, both with Nielsen in general and also as part of the emma process, that while they are reasonably big print players, they are not so large in the digital sphere.

NICOLAS COUR: We have three important goals. The first one is to create new hooks in order to have the best fusion with official data. Our goal is to create for next year what you did with the NRS in the UK but to do it with Nielsen because Nielsen is the official online measurement system in France today. The most important thing is to create data for good fusion and to have the best hooks data in order to fuse the French NRS for the paper and the online measurement for websites and mobile, because we will do it with mobile next year. So this is the first goal.

The second goal is that it is a single source measure but not an official measure. Everybody, even advertising agencies, knows that it is a declarative measurement, quite different from a passive measurement, but it is very important to have a global figure for publishers in order to communicate the strengths of their brands.

Finally, it is very, very interesting that the figures are not so far for the digital part from the official Nielsen figures.

The third goal is to explain and measure evolutions about how many people are reading on smart phones, tablets, et cetera, so it is a way for the French NRS to create a new establishment survey in order to give very interesting figures about attitudes, behaviours, of readings. That is why we created this concept on the French market of multi-reading, in order to explain that there is a new distribution of readings on different devices, including paper.

So goals of promotion, communication -- technical goals -- to create the best hooks for database fusion with Nielsen next year, and also to give new figures which are very interesting for the French market about how people are reading on the different devices.

HARALD AMSCHLER: In the new NRS in Switzerland we have both types of data. We have both the technical measured passive data and the survey data, so there is a war of belief in Switzerland as to whether you can use this type of data or the other.

But I think I would like to make it a little bit more complex. You were speaking about application, but application between what? We have a very lively discussion about what should be compared, but what is the equivalent of an average issue? What is the equivalent? So we have started the discussion.

We also have a survey called total audience so we have the duplication, but the agencies and the advertisers said, “So what”? Are you comparing a daily reach of a whole channel, or is it a monthly reach, a weekly reach? Is it the whole channel or part of the channel?

The first step should be to clarify what are equivalents and what should be duplicated.

IRENA PETRIC: I recognise the problem. In the past few years we fused our NRS survey data with the currency at that time for the internet data, for the website audience, their currency, and the magazines had very low figures for their website audience. I recognise yours, Harald, too, because we created different types of data for websites, so daily reach, weekly reach, monthly reach.
Finally, it turned out that newspapers especially were using this data and magazines not as much, but even newspapers were comparing the average issue readership of a printed edition with a monthly reach of a website, which again caused a lot of discussion with media buying agencies.

JULIAN BAIM: I would like to address your question, Guy, because it is a larger question about really what is the best measurement technique for websites, for example. I think it is generally accepted that, with issues about cookie deletions, et cetera, the passive measurement is the standard bearer for websites, and the survey-based measurement for website behaviour, and I think Nicholas said it as well, can’t be equated as a ratings level equivalent, a ratings level measurement, because of the limitations of recall. If you are on the website for 5 seconds the passive measurement will collect that information; the survey ability or your recall of that behaviour will be very sketchy at best, and it will be unlikely that you will recall that behaviour at all.

In addition, because you use search engines, you might end up on websites where you don’t really know the website, literally, that you are on but, again, your passive data is capturing it. So you have to recognise the superiority of the passive data versus survey recall-based data for website behaviour.

Nevertheless, a well-designed question can help you inform, again, a well-designed fusion to get the best estimate of duplication, but it is inevitable that you are going to have to rely on some passive data for the metrics for your website behaviour as opposed to using survey-based data.

STEVE DOUGLAS: I was fascinated by the Swiss paper for a couple of points. You did the screen using the telephone. What was the response rate to the telephone screen?

The second question was you used an extremely long online survey. I have never heard of anybody really successfully pulling off a 45-minute survey and holding on to large percentages of the population. Did you have some special kind of incentive?

Also you kind of flabbergasted me when you said you did an hour-long follow-up survey online. I do not understand how that can be done and how much of the sample you retained.

JELLA HOFFMAN: Perhaps I will start with the second question, because that is much easier.

Actually, that wasn’t us. We do not have a one-hour follow-up questionnaire. It was probably Australia. We have a follow-up questionnaire as well but that is on paper and pencil and that is about 2 or 3 hours -- and there is a very nice incentive for that!

We have an incentive for the main questionnaire of 10 CHF -- not that much but something -- and, if I recall the first question correctly, you wanted to know how the response rate was in the CATI recruitment?

STEVE DOUGLAS: Yes.

JELLA HOFFMAN: That is about 40 per cent.

HARALD AMSCHLER: 40 per cent on the household level, and then of course we have another 40 per cent coming from the household to the target person, so it is 40 per cent and then 60 per cent, so you multiply it and then you reach something like 25. But I have to mention they are pure figures. In many companies they work with neutral sample losses, so we just count their one hundred percent and then their realised interviews and then we end up with a 40 per cent household level and 60 per cent target person level, or something like that.

ANDREW GREEN: Shall I try and address the 45-minute question?
Steve, we started from your position. We thought how can we have an online survey lasting longer than 25 minutes? We thought it can’t be done and, of course, when we wrote out all the questions we wanted to ask this is how long it took, and I have to say we were very happy that enough people did respond to make it viable, and that around half of the people who had already filled in a 45-minute questionnaire, just under 50 per cent, went on to spend the full 70 minutes answering the product questionnaire. We asked for feedback to the end of the survey as well to see how they found it, and obviously they finished it so they can’t have hated it too much.

We report 15 different response rates to our auditor on a monthly basis. The clients have chosen so far not to report any headline response rate, but we report every month to a technical committee and an auditor, who are pretty satisfied that those response rates are quite stable and okay for what we are doing.

I’m not going to give you a number but the conclusion really is it has worked, perhaps to our surprise in the first instance.

MAX KILGER: This question is for Julian. All I can say is “Wow!” Looking at the comparison between the passive data, the survey data and the beta-binomial model my first thought was “Maybe these guys started drinking before they started!”

JULIAN BAIM: That is only on every other day, Max!

MAX KILGER: Seriously, Julian, do you have an explanation about why it works so well? I’m just curious.

JULIAN BAIM: I think the beta-binomial is a very robust algorithm that is used. We were surprised. It has been refined over the years but if you go back to highest paper it is very limited. If I recall it is three newspapers and three observations and, again, it is diary-based data. We were not necessarily surprised about the survey-based findings but the fact that the passive data would replicate that model years later was astounding. We had the same reaction. Other than that, I think it is a robust underlying distribution that can be used.

There are probably others. We were thinking if it didn’t fit we were going to try to fit other distributions, but we didn’t proceed with that. Maybe we should have but then I would have had 20 authors instead of 9!

JOHN FAASSE: I have a question for Adina and Ingvar.

First, one thing was posed more or less as a side remark by Ingvar, that you skipped the filter questions which means you threw away 33 years of discussion on how to phrase the filter question, and just by saying it didn’t add anything!

The second thing was that first you tried to prove yourself morally above the Australians by going for the lowest figure; then you multiplied a number of maybe not too well validated or viable points, ending up with the highest figure I have ever seen on one of these symposia, so could you comment on that?

INGVAR SANDVIK: Was that a question or a comment?

ALKE BASSLER: I would like to comment on the highest figure ever, because the goal was to find a figure that was comparable to TV and radio and other channels, and we wanted to visualise in the currency what exposure you got, so the gross exposure point is so far what I see as the media channel magazines’ very important new currency. That is the goal, and I think it is accurate because you describe actual exposure, as you do on TV.
The readership figure will always also be important for the editorial environment, so this is also very important from the commercial perspective.

INGVAR SANDVIK: On the hurdle question, we just tested it and found that we do 110 titles, and to go through all 110 first with the hurdle question and then with some kind of recency question was not necessary. We just combined those two questions into a scale question, so we go through every title just once. That was to save time. There have been comments here on long questionnaires, so it was to try to keep the time down. On the internet people expect things to go pretty quickly, and that was really the reason.

STANLEY FEDERMAN: I think this is a question for Heather and Andrew but I am not sure. Phil brought up something this morning, something that is a fact of life in our business, which is the cultural divide between those people who think that engagement is the measure for everything digital and the other group that feels that exposure is still the measure, and how you bring these two together.

There was a component of it, I thought, in the Australian study that might have given a metric that would help on this, and that is the chart that you talked about when you dug further into the digital area and you looked at the engagement. One of the questions on engagement I thought you said was source, and you had primary and secondary, and I wondered whether those two measures summed up to equal your total exposure to the digital question.

HEATHER WHITE: It was a question that referred to the print, not to the digital, and yes, the secondary and primary readership of a title add up to the total exposure, so anybody who was exposed to that.

STANLEY FEDERMAN: So the engagement measures for print?

HEATHER WHITE: Yes.

STANLEY FEDERMAN: So there is at least some information there about those two relating to each other?

HEATHER WHITE: Yes.

GILLES SANTINI: I have a comment for Julian, and it may be a partial answer to Max.

Since you are asking the magazines to provide you the number of people who have seen once, twice, et cetera, for all combinations of the issues, you are making an underlying assumption that the data is exchangeable.

If the data is exchangeable and if you apply definitist theorems, then it must be a beta-binomial, so probably your fit is so good because you are thinking that any combination of two issues should play the same role.

JULIAN BAIM: Yes. We made the assumption that we were looking at any combination rather than two successive combinations, or any single examination.

ELLEN ROMER: I have a question for the Ipsos and TNS teams. You are displacing the currency measurements in Australia and Norway respectively and you have done extensive pilot research to test your new methodologies, so I am curious, what other steps do you think are necessary to gain acceptance in the markets? What is going to be the process for acceptance?

ANDREW GREEN: We are in the middle of the process for acceptance, of course. I think there are several steps.
Obviously we had to start with technical rigour, so over the past couple of years we have done, as Heather alluded to, 40 or more pilots and tests where we have tried to, if you like, put each of our methodological changes through quite a tough series of quality tests with independent consultants and all the rest of it. So the first is trying to get that technical rigour, not just “we say so” but proven with those tests.

Second, yes, it is awareness, constant marketing, face-to-face meetings, and going and telling people why it is important to be accurate, because we are of the opinion that this is a better and more accurate survey than the one that our competitor runs, although he may have a different view. So it is really all about marketing the advantages that we think this survey has. Market acceptance is partly about that, partly about pricing and all the other marketing things you can imagine, so no real mystery, I don’t think.

ANDY BROWN: Any differences in Norway?

INGVAR SANDVIK: What we will start out with now is, first of all, an internal process with the magazine publishers, to really have them going into how this could work in the market with such new thinking, and then probably we should team up with one media agency, one client, maybe two of them or something like that, and try it out for half a year or something to see more precisely how this can benefit the magazine publishers. Into that we need to take both print and online, not just print. I think that is very important.

ANDREW GREEN: I just want to add one thing that you reminded me of.

Since the beginning, for the last 2 or 3 years, we have had all the stakeholders involved, so although we haven’t been publicly talking about our methodology, representatives from magazine publishers, newspaper publishers and media agencies have all been involved every step of the way. It is like a pre buy-in, so that is part of the acceptance as well.

HORST STIPP: I like Julian’s concept of the passive opportunity, but maybe there is another opportunity. The ARF is very much focused on mobile research issues. We recently got hold of a brand new study where respondents filled out media use questions. It was up to them whether they filled them out on a PC or a mobile device. The mobile smartphone data were more accurate and -- here is the good one -- higher.

I didn’t really hear anybody using mobile phones to obtain magazine reading data. Is that something that you are looking at? That you have rejected? Or is that still the future for you?

NICOLAS COUR: As I said, we are beginning our R&D process on this topic because it is very important, and we are discussing with our auditor, our French JIC, the CESP, the technical and scientific committee, who asked us to work in this field in order to find new solutions, in order to interview especially people on smartphones and tablets. But how?

We are a long way from finding a good way because we are not used to passing through different types of questionnaire, especially in terms of designs, because you cannot have the same questionnaire on a mobile device and on the web, so it is very difficult. So we will try to have the budget from publishers in order to work on this R&D process next year, but this is our first R&D priority for the next two years, how to create a new NRS interview on different online platforms and not only on the web.

ANDREW GREEN: In Australia the survey can be responded to on tablets or PCs, and our face-to-face interviews, about 8 per cent of the total, take place on iPads. We are not optimised for mobile at this point.
PETER CALLIUS: I have a question for my Australian friends.

I’m thinking of the slightly exciting term “over-stimulation” regarding the six front pages that you showed. How did magazines respond to that term and how did you validate it to be too high or “over-stimulated”?

HEATHER WHITE: This was one of the 40-plus tests that we went through, and basically we were getting readership numbers. Already if you look at the readership numbers at 3-plus, many people in the room are going “Oh, my God, how could you have a 60 per cent increase in readership compared to the previous work?” Of course it is a zero sum game. We are starting again. It is the start, and that is the only way it can be accepted into the market place.

In terms of over-stimulation we are literally getting people agreeing to titles way back in the past. I don’t have the paperwork here to describe it to you but I can talk through with you later how we came to the view that it was over-stimulation that was taking place. Basically we were seeing numbers that did not make common sense. We did numerous tests in that process to work out what was going on, including talking to people, doing post interviews with people and qualitative work to try and understand exactly what was going on and why we were getting the high levels of readership numbers that we were, which meant we ended up with three rather than six titles that we were measuring. We did this over months of time with many, many titles.

ANDY BROWN: Thank you. I would like to thank all of the speakers for what I thought was an extremely good session this morning, and look forward to seeing you later.
SESSION 2. TACKLING SPECIALISED MEASUREMENT CHALLENGES
Moderator: Richard Silman

PRESENTATIONS:

07. THE FUTURE OF MEASUREMENT.
Jennie Beck, Kantar Media.

08. AUDIENCE MEASUREMENT WORLDWIDE: LATEST DEVELOPMENTS.
Katherine Page, National Readership Survey, GB

09. MEASURING A MEDIA BRAND ACROSS PLATFORMS.
Berit Puggaard, TNS Gallup, and Paul Melbye, JP/Politikens Hus.

10. REACHING THE CELLPHONE ONLY POPULATION.
David Eden, Scarborough.

11. BELGIUM: E-VOLUTIONISING PRESS AUDIENCE MEASUREMENT.
Luc Eeckhout, CIM, and Bernard Cools, SPACE.

12. ARF FOUNDATIONS OF QUALITY -- A REVIEW.
John Bremer, Toluna/The ARF.

13. BROWSING@WORK: SIGNIFICANCE FOR ONLINE ROI EVALUATION.
Marion Appel, GfK

DISCUSSIONS (Presentation 07-13)

JULIAN BAIM: This question is for David.

I noticed there were two changes that were made to the newspaper readership question from the traditional one that was asked. One was to increase the length of the screen or filter question and the other was to go from an unaided “When was the last time you read?” to frequency of reading, and you do wind up with very close numbers. I was wondering if you were able to look at both of those components and evaluate the relative impact of those changes on your final results.

DAVID EDEN: No, we didn’t, as far as I know, do that part of it. We believed we had to move to the screener and frequency format because that, as has been shown over the years, works in a self-administered format, and the kinds of questions we asked on the phone just would not work obviously, for the same reasons they would never work in a booklet self-administered format, so it was kind of a given from the beginning, that we would move to some kind of screener in a frequency format.

As far as you are asking about sorting out the impact, not that I’m aware. I could certainly follow up on that and let you know if anyone else knows more about that at the company.

ANDREW GREEN: Another question for David.

I didn’t see any mention of Saturday newspapers. I kept seeing weekday and Sunday and no Saturday. Was that just for brevity or did you not do anything with Saturday newspapers, or was it incorporated in Sundays?
DAVID EDEN: In our current methodology we only measure Saturday papers in a limited number of markets, and the markets that were included in this test were not among those markets, so you are right, Saturday papers was not part of this test.

HARALD AMSCHLER: I have a question for the team from Belgium.

If I got it right, you have this paper and digital reach somehow combined and you have now the printed version, and the usership of applications, for example.

In Switzerland we have an endless discussion. If you use an app on an iPad or a smartphone then sometimes you are directed to the normal website. There are so many different versions so you use this device and then you may end on another channel. Is this also a discussion in Belgium, that somehow they criticise your results, or not?

LUC EECKHOUT: Actually there were not so many critics on the methods. We used a method that is based on three different devices and three different formats, so we tried to make a good combination of that.

To be honest, analysing the results we also saw some incoherences, things that looked like people messed up somewhere, mostly with PDF or apps, so that is why, for instance, for the new survey we have on the server, which is the fieldwork which is running right now, we put them together, so they are going to be measured now together.

JENNIE BECK: It is a problem the other way too, because on tablets and smartphones you can go to a website and download that website as an app-type icon on your screen that you could easily mistake for an app when you are answering questions, so there are all sorts of issues around this. The question is you have to start measuring it and then resolve those as you go along.

MAX KILGER: A question for David.

You said that you were doing some cellphone random digital dialing. If I remember rightly, in the United States it is illegal to do that with any sort of auto-dialing or predictive dialing system. What kind of issues are you having there?

Secondly, I think I remember recently some legal case in the US where somebody sent somebody else a text while they were driving and they answered driving back and basically crashed into somebody and they were successfully sued, so what do you think the exposure is there?

LUC EECKHOUT: Can I refer that to counsel? I am sorry, remind me of the first part of the question?

MAX KILGER: It was about the issues around random digit dialling because with no auto-dialers and no predictive dialers you have to manually dial the cellphone.

DAVID EDEN: That is right, we do, and it adds to the expense and that is one of the problems we are dealing with. Hopefully either the law will change or we will find better ways of adapting that, but for now they are being manually dialled.

As for the liability question, we do start out with several safety-related questions. I don’t know if we specifically mention driving a car but it would be “Are you doing anything where there might be some danger to your taking this survey?” or something like that.

MAX KILGER: So what if they answered “Yes, I’m doing something dangerous”, and they crash?
DAVID EDEN: Well, they shouldn’t be answering their phone if they are driving. As far as liability, it is the US, so anything is possible, that’s true.

ERHARD MEIER: My question is to John Bremer, and I hope I’m not the only one who hasn’t got a definition of what is a router and a non-router.

JOHN BREMER: I went through that quickly, so I can understand that completely.

Part of the problem is there are a lot of different routers out there, so coming up with a definition that clearly describes all of them is very difficult.

A router is a methodology -- and again, it can be done in multiple ways -- where a respondent comes into an environment, typically they are asked screener questions, looking across a series of surveys, not just one, and, depending on if it is defined as a serial router, they are asked these questions in order. They are asked the screener questions for a survey. If they qualify for that survey they go to the main body of the survey. If they don’t qualify for that survey, they go to the next screener.

If it is what is known as a parallel router, you are asked five or ten screeners at once. To make things easier you are not asked all the screening questions, so one potential problem with parallel routers is that you may go to a survey and then find out within the questions you were not asked from the screener that you are not qualified. That is not the case in a serial router.

If you don’t qualify, basically, the reason that routers came into being is for more efficient use of samples, so these individuals have said, “Yes, I want to take a survey”. If they don’t qualify for the survey, in some sense that is a lost opportunity. What is unknown is -- well, what we are finding out is what is the effect of moving them from one survey to the next. Is there a dramatic difference in the response? Have we conditioned them to some degree?

Routers are in fairly high use within the industry but most people don’t know that, so this was one of the big arenas in the foundations of quality that tried to shed more light on routers. I apologise if you still don’t know exactly what it is but read the paper, because I think I give a much better explanation there. Part of the problem is that there are multiple versions of routers, but it is intended to make the user sample more efficient.

GUY CONSTERDINE: I think if we substitute the word “filter” for “router” it would be more easily understood in England. I’m reminded of Winston Churchill saying England and America were separated by a common language, and I think that is part of the problem here.

Jennie, you said you want to think in future more in terms of video, audio and text rather than the traditional media groupings, newspapers, magazines and so on. Could you expand on what the implications are of that way of looking at it, and what it means for surveys like NRS and so on?

JENNIE BECK: One of the reasons that we chose that way of describing content type is, as a measurement company, we have different solutions for different types of things. So for video there is potential to use picture matching; for audio there is potential to use audio matching; for text we don’t have a text matching service yet but you are starting out from the initial content identification solution being different for each category of content. So we are describing that purely from a measurement company’s point of view, that we have different ways of identifying content and they each require different types of solution.

Plus, of course, as a newspaper publisher, you now have text, video and audio on your website, and we probably need to have slightly different ways of measuring each of those things on a website rather than just saying we are going to measure a print website.
GUY CONSTERDINE: I’m not sure I have thoroughly explored the implications of that but if one is measuring tablet advertising, for instance, that is published by, say, a magazine or a newspaper publisher, some of the ads have got video, some audio and some are just static. Are you thinking in terms of different ways of measuring those than we currently do, or not?

JENNIE BECK: It depends whether the context in which they are sitting is video, audio or text. It is the context we are measuring rather than the ad itself sometimes. If it is a tagged ad then it is a tagged ad whatever it contains, but the metrics that we are using are also different for video, audio and text. We don’t have viewability measures on audio and text, we don’t have switching out and time spent on text in the same way as we do for audio, where we know if somebody has switched out of a commercial halfway through or a programme, so it is different metrics and different solutions. It is a more convenient way of us saying this is all video, this is video and audio, this is all text, and applying a solution for each of those.

We have to then link that to the platform measurement and the device measurement, and that is where it becomes even more complicated.

VLADIMIR SHCHIPKOV: I have a question to Marion. Did you provide any comparative analysis of the hybrid panel’s approach of your @work model and fusion approach which shows definitely that your approach provides a more reliable or more accurate result? If yes, which hybrid panel did you use for this comparative analysis?

MARION APPEL: I don’t know if I can answer this question because in fact it was, as I said, done in the German analysis team.

I don’t know the answer to your question, I’m sorry, but I will be able to come back to you.

STANLEY FEDERMAN: This is to John.

The growth of online research is obvious and you showed us a lot of ways to improve it, but I’m curious whether Google participated in your online research project and whether the numbers were included in the dollar growth of the medium, of the research methodology.

JOHN BREMER: Google was not one of the sample providers. What they are doing is very interesting. There are several things that in some ways didn’t allow them to be part of this exercise. They have recently expanded what they are doing but, particularly at the time of the exercise, you only got two questions that responded, so I think even they would have agreed that the median time was 23 minutes. That would not have been available in their current context.

They are actually changing what they are doing and I always thought this would be the idea. The two questions was just to get them into the fold.

They have done research on their own data and there are some positives and negatives with regard to that data, but just because of the context they were not included in this exercise.

RICHARD SILMAN: I have a question for Berit and Paul. You showed some excellent response rates. Why do you think they were so good?

BERIT PUGGAARD: No idea really!

In general we have much higher response rates than I have been accustomed to listening to from others, because I think in our NRS, which is a 25-minute CASI and a 40-minute online interview, we still have about 66-67 per cent completing the whole thing, which is very high, I think. I think our brand helps us a lot in Denmark but in general I think in Scandinavia they have pretty high response
rates. There is just the warning, as well. We screened them and told them what they were supposed to do, and they did it.

RICHARD SILMAN: It is nothing to do with the 100 Euro incentive? That’s a joke!

BERIT PUGGAARD: Actually we only have prize drawings, so they can win a 300 kroner gift certificate, which is about 40 Euro-- but they can win it. They don’t get it. I think we had ten or twelve gift certificates per thousand respondents.

DAWN MITCHELL: Katherine, looking at the trends over recent years, has the pace of change accelerated in the surveys? Also, to what extent are any of the surveys moving towards multimedia measurement?

KATHERINE PAGE: I think that the area where very clearly there was considerable pace was the measurement of digital platforms, because we could see a big change in the data from two years ago. That is clearly what is driving change at the moment.

DAWN MITCHELL: To what extent are they moving to multimedia surveys, or are the surveys getting together from the different media to produce single surveys in the countries?

KATHERINE PAGE: Definitely a few of the new entrants I measured are approaching the task as essentially a multimedia task, and we are also setting up a multimedia section for surveys that have been brought together. There is definitely more evidence of that.

RICHARD SILMAN: I would like to thank you all for staying and being here in this presentation. Also, of course, I’d like you to join me in thanking our speakers for an excellent set of papers.
MONDAY 14 OCTOBER, 2013

SESSION 3.  WHO GETS THE CREDIT?
Moderator: Guy Consterdine.

PROGRAMME CHAIRMAN’S PRELIMINARY REMARKS:

SCOTT McDONALD: A few things to say before we start the morning session. Yesterday pretty much through the whole day we took a tour of the world looking at how measurement systems were adopting different techniques in response to the challenges of cross-platform measurement, all really directed toward the accurate counting of exposures.

Today we move more to the other end of the process and take a look at advertising effectiveness, and how the systems and the approaches that we use to try to document the impact of advertising have been adjusting to those same kinds of challenges, and I think it will be a very nice counter to that.

The first thing you might notice about this morning’s session is that the programme is reversed in terms of the two morning chair people. Guy probably doesn’t need introduction to most of the people in this room. He has been a part of this tribe for many years. I have known him, I guess, for at least 20 years in which time he has been the head of his own very well regarded consultants in the UK, I have hired him to do a project once for Condé Nast in New York that was brilliantly executed. He worked really on the publishing side for newspapers and magazines in the UK and part of that on the agency side.

The morning chair assignments are shared between two different chairs and the other chair may be a newer name for many people in the room. Gayle Fuguit. Gayle has a complementary background. She is the newly installed President of the ARF and has moved to New York to take that position and is doing a bang-up job in the first few months there already, and she will be speaking briefly tomorrow about some of the conversations we are having between the ARF and PDRF about new ways of collaborating together and making both organisations stronger.

Gayle comes to the job at the ARF from I guess 30 years or so at General Mills, so her deepest professional experience is really on the client side, but that in some ways gives it short shrift because part of her very innovative role at that advertiser, at the very large packaged goods company, was to really try and innovate and research suppliers as well, and as such she was instrumental in several of the most innovative market research suppliers in the United States including companies like Market Tools and Iconoculture, both of which she served on the board of and was instrumental in the beginnings of, so she is a mover and shaker and innovator and does it regardless of which position she is in. I think it is a very fortunate move on the part of ARF to have induced her to come out of what she thought was going to be retirement and take on a nice juicy role at the ARF.

So she will chair the second part of this morning and then both Guy and Gayle will moderate the extended sessions and the Q&A.

PRESENTATIONS:

14. COST EFFICIENT STRATEGY FOR ADVERTISING ROI.
Max Kilger and Ellen Romer, Experian Marketing Services.

15. BETTER REPRESENTING PRINT MAGAZINES IN ROI ANALYSIS.
Randy Freisner, The Martin Agency, and Jim Collins, GfK MRI.
16. INFLUENCE METRIC AND HOLISTIC CONSUMERS BEHAVIOUR MEASUREMENTS.
Yaakov Kimelfeld, Millward Brown

17. THE INCREMENTAL IMPACT OF CROSS-MEDIA CAMPAIGNS.
Charles-Emmanuel Amand, Corelio, and Antoon van der Steichel, Ipsos.

18. TABLET MAGAZINE ADVERTISING: THE OPPORTUNITY.
Michal Galin, GfK MRI, and Britta Cleveland, Meredith Corporation.

QUESTIONS (Presentations 14 -18)

CARYN KLEIN: I have a question for Yaakov. I thought this was really interesting. I think it provides a really granular view on online, and understanding the purchase path. I was actually thinking about it for the automotive category. We know there are other sources of information that are influential in someone’s purchase of a car, but I’m curious to know if you have given thought to integrating that data with other data for other sources of information, and whether you can understand the influence of not only online but perhaps magazines and TV and other kinds of information.

YAAKOV KIMELFELD: We do studies for automotive as well, and also sales, by the way, because we manage other types of data available about automotive sales, and not everything is online.

Regarding other sources and channels and means of information, digital -- if it is mobile or digital print on iPad -- could all be brought together. It doesn’t matter. It is part of digital data.

In terms of analog media it is probably an opportunity to see based on that particular person being able to see an ad on TV or read it in a newspaper, so it is really survey based and an opportunity to see. It is currently being done and called cross-media studies. Certainly it is hard to bring this information together but technology at some point is going to sort out our problems and everything will just become digital.

Meanwhile we have some secondary less perfect ways to address this.

TIPHAINE GOISBEAULT: Thank you for this presentation, it was very interesting. I have a question about causality issues. It is very difficult to detect ad effectiveness, especially on new devices, and perhaps I’m mistaken but I’m not sure you dealt with these causality issues because you know the results can be completely different from one device to another when it deals with proactivity, profile, equipment, etc. Could you tell me a bit about how you deal with these issues?

GUY CONSTERDINE: Who would you like to answer that question?

TIPHAINE GOISBEAULT: I don’t know. Sorry! Perhaps GfK?

GUY CONSTERDINE: All panel members, do you have a comment on that? Mickey?

MICHAL GALIN: Causality? We really measure in the Starch work print and digital ad effectiveness based on readership of the issue, so we ask people if they read the issue first, if they are readers of the magazine, and then afterwards if they read that specific issue.

So we do really assess whether they are readers of the magazine and readers of the issue before we show them any of the ads. That said, we don’t ask them if maybe they have read other magazines that have the ad running in as well. There are other surveys that are running concurrently but within the survey itself we are not assessing, so yes, that would be a weakness but we do evaluate whether they are readers of the magazine and if they had the opportunity to see the ad in that particular issue.
BRITTA CLEVELAND: We focused on one device only, on ads that were on the iPad, because we realised there were different ad scores in other devices because the creative was presented in a different format, so we took that as being something we would discover later on. We are focused right now on role behaviour.

SESSION 4. SALES IMPACT CASE STUDIES.
Moderator: Gayle Fuguitt.

19. INVESTIGATING EFFECTIVENESS: G+J SUCCESS BAROMETER.
Christoph Danne, Gruner + Jahr AG & Co KG.

20. MAGAZINES DRIVE EFFICIENT SALES ... GUARANTEED.
Britta Cleveland, Meredith Corporation, and Leslie Wood, Neilsen Catalina Solutions.

21. CROSSPLATFORM SALES IMPACT: CRACKING THE CODE.
Caryn Klein, Time Inc, and Leslie Wood, Neilsen Catalina Solutions.

DISCUSSION (Presentations 14 -18 and 19 – 21)

GUY CONSTERDINE: Welcome to our main discussion session of the morning. Before that I have two announcements to make, both I’m afraid concerning deaths.

One is the death of the International Herald Tribune. This is the last issue of the paper under this name. It will be replaced tomorrow but it will be the International New York Times, so it will be a rather different thing, a different name. We have talked a lot about the fast pace of change in the media environment these days and the effect of digital platforms on the traditional media platforms and this is one example of it, so it is a little landmark of today.

There are some copies of the final edition of the IHT outside which you are welcome to help yourself to. Somebody predicted it would become quite a collector’s item and worth something on ebay in time!

The other is a more personal death. Many of you will remember Erwin Ephron, who was a regular member of this Symposium tribe. He died yesterday after I believe quite a long illness. He was a great contributor to this Symposium. I always regarded him as a great philosopher of readership research and wider research aspects. He always had very distinctive slides with about three words on them as he went through. For some strange reason I always remember one particular phrase of his. He was describing the complexity of readership research and he said: “Readership research is not like counting horses in a park”. Somehow that stuck in my mind, but it is certainly not about counting 1, 2, 3, 4.

LESLIE WOOD: Erwin was generous, definitely a philosopher, an orator and quite a professor. He was a genius for taking the work we do in this research community and making it really approachable and understandable and usable to the wider advertising community.

He is probably best known for his work on recency, which very personally was the work that I had been doing for four or five years. I had been talking in our small community about the work I had been doing on recency, and he took that work out into the world and made it famous. He changed the way the industry did media planning based on my work, and I could have been talking for ever and it wouldn’t have changed anything, so his genius for turning our complicated, complex ideas into something that everybody could use, that would change their behaviour, was really amazing.
He will be sorely missed in this much more complex world that continues to be harder and harder to understand. Not having somebody take our work out into the rest of the world will be a huge loss. We say “So long”, and sorry for losing you, Erwin.

GUY CONSTERDINE: Thank you for that.

Let’s move now to the papers that we have heard this morning, but before we do so I would like to begin -- and I warned her of this -- by drawing on Gayle’s long experience as a major advertiser and to ask from that perspective, and looking across all the papers that we have heard on ROI and various other issues, how relevant and persuasive she thinks advertisers will find this material?

GAYLE FUGUITT: I think the material is very relevant and I think they will find it very interesting. The challenge is that you have your plan set, your budget set, and then you have to figure out how to create these new techniques and capabilities into your everyday planning, so from that standpoint it is about getting more practical. Which brand do you start on? A big brand, where you can have a really big impact? Or maybe a smaller brand or a brand that you have not advertised previously? That offers maybe a strategy for an entry point with advertisers, for those of you who are looking at connecting there.

The other challenge is how we get the metrics to talk to each other. We have a lot of different metrics in these different papers and every advertiser has their own modelling and set of nomenclature and metrics that have a lot of acronyms in, so one of the challenges when we bring in these new capabilities is how we get them to align with existing models.

We are getting really close to the point where advertisers are challenged with do I keep the model I have today and bolt on new metrics, or do I need to really turn the model over and recreate it?

GUY CONSTERDINE: Are there any questions to any of the speakers that we heard this morning?

KATHI LOVE: I thank all the presenters for their papers today; I found them very interesting. My question is closer to Guy’s.

I have been in this industry -- longer than I look, is what everybody is supposed to say! -- from the time when we only based media multiplier effects on attitude, to now very sophisticated analyses looking at the actual rise in sales as a function of using multimedia. I also saw yesterday that magazine ad spending has slowed. So I would be interested, purely for those who work for magazine companies, what does it take?

We have found these same results in different forms for literally decades. Now we have them sophisticatedly quantified and are able to estimate the dollar impact, and the decline is still declining. So I’d like to hear about the impact of research on the real business challenges we face.

BRITTA CLEVELAND: What has been really interesting about the exercise we have had is the conversations we have had with clients, and the biggest takeaway is the expectation of what magazines can do to sales and the idea that if they run a few pages they are going to see an immense result.

I always bring it back to television and say “You would not run a television campaign if you didn’t have at least 50 GRPs in the week”, and what we are asking for in print is significantly less than that.

This has been an education, and as a result of educating about the difference between the media we are able to show that you have to have certain minimum levels in order to see a response in behaviour. I think that has probably been the best thing we have been able to do.

As a result of the guarantee we have offered we have seen increases in revenue from existing clients and brought new clients in.
GUY CONSTERDINE: In fact, Britta’s comment about very low level of GRPs in magazines reminds me of what we were doing in the UK. We were analysing typical television schedules of major advertisers with hundreds of GRPs a week, or over a hundred, but then looking at the magazine expenditure, typically in I think the top 100, it was only on average nine GRPs a week in magazines, and we were arguing that at the very least we should multiply it by three times and aim for at least 30 GRPs a week. That at least should make it measurable (although we don’t really think it is measurable but you can’t ask for an infinite number, so it comes to the same thing). There is too small a weekly weight of exposures in magazines in typical schedules of large advertisers.

CARYN KLEIN: I’m sorry to interrupt but I do think this is a really great question, Kathi. I think we have seen an evolution over the past three years. We have always had softer measures for magazines and what we do, what they provide in a consumers’ journey, if you will, but what I think has really changed, and you saw it today in some respects, is the result -- the fact that we are really driven by delivering a result, which is sales. That is what has changed.

Britta mentioned that she has been meeting with a lot of her advertisers and so have I. Actually I was at General Mills a couple of weeks ago and Gayle hit on something that I think is really important, which is how do you marry this kind of data with what a company has done with their mixed models, and the practices that they have embedded that they rely on.

The conversations that we are now having, which is terrific, is they now are saying, “Wow, we now see that magazines are generating sales and we have to figure out how to use this in what we do. How do we integrate the sales effect reporting into the models?” So it is an interesting and a different conversation that we are having.

LESLIE WOOD: We have also been seeing the same question come up in terms of how we put these things together, and we have written some of it in the Time Inc paper, but Nielsen is working towards one truth, trying to find ways to put all these measures together into a single truth, the idea being that the one person in a room who does not know what time it is is the person with two watches and that if you have too many measures you just don’t know what you are doing.

What we are trying to do is provide better ways to include all of this information into a single measure, and that will also help.

YAAKOV KIMELFELD: One of the problems is not that magazines don’t work, they do, and every time you go and design a study you always find the effect of magazines, but the problem is trend, not brand.

Magazines work in exactly the same way as digital. Before digital came out magazines were the main repository of niche interests, so if you had a special interest and if you wanted up-to-date information in that field you would have to go into all these magazine stores and buy the appropriate magazines. That was the only way. Now you can go online and every single brand extension competes with magazines. Online everything has a magazine. So the problem is not that they don’t work; it is suddenly that there is much larger competition.

STEVE DOUGLAS: My question is to Leslie, and I guess a secondary question might be to Jim Collins.

You mentioned something about Nielsen trying to measure secondary audiences of magazines. Would that be in the context of the Homescan panel, or in the context of your mixed panels?

Is there any way to incorporate the Nielsen MRI fusion to get some insight into the secondary effect of magazines and these ad sales tests?
LESLE WOOD: What we designed with MRI is to use MRI’s surveys in matching those households to our data, so we would have exposure to magazines. We can dedupe who was a subscriber and who was not from the studies. We would use both MRI’s national study as well as the issue specific studies. Starch is single issue each one, so that is not quite as valuable. That is roughly a million households being tracked over a year, which gives you quite a rich database.

We don’t believe that fusion is a good tool for measuring ROI. We think it is a great tool for measuring biographics and targeting. Certainly fusion does a better job than you could do with age/sex matching, but knowing who bought and who was exposed, it has to be the exact same household. They can’t be fused.

Does that help?

BRITTA CLEVELAND: Adding to that, when we first developed this methodology for print with Nielsen 2.5 years ago or so, that was the biggest question. Advertisers are buying total audience from us, not subscribers only, so by showing ROIs on subscribers you are spending a lot of money and only seeing a return on a small group.

So using MRI data we looked at the primary versus the secondary and at the impact of advertising, and actually Starch and Affinity in Vista had it too, where you could see that the purchasing proclivity is the same for the secondary as for the primary.

On top of that we are trying to equivalise the readership to the households. Homescan and Catalina are household-based sales, so we have to convert all of the magazine readership into households which lowers the number as well. So it is definitely a challenge and it would be a very expensive proposition to do a match with the respondent level databased data for MRI with all of the magazines, but in the meantime at least we know we have positive ROIs, even just on the subscriber level without even adding secondary.

LESLE WOOD: Steve, you asked whether that was Homescan. It is Homescan and all the Catalina data.

GUY CONSTERDINE: I love Britta’s word “equivalise”. I shall remember to use that!

DICK DODSON: My question is to Max. First paper of the day and an interesting paper. We have been looking at some of the things. Typically the syndicated surveys are weighted by quarter. Did you reweight the samples on a weekly basis, and did you have problems of reweighting when you go down to the weekly sample sizes?

MAX KILGER: That is a great question. There is quite a sophisticated weighting scheme involved in that. Every week’s worth of data has 25 different potential weights, depending on the estimate that has been used, so yes. If you are interested we can talk afterwards about exactly how it worked.

HARM HARTMAN: I have a question about the ROI because it is so impressive but it puzzles me a little bit.

What I miss in these ROI questions is shouldn’t you take into account also what the competition is doing so that you have a look at the share of voice, because now it is a linear relationship and every dollar spent brings money in the pocket, so if you did that the world would be simple.

The other thing is there is also diminishing returns and it is presented as a linear relationship, but there must be a maximum to these kind of ROIs.
LESLIE WOOD: Absolutely, and I will take the second question first.

It is definitely not a linear relationship. We can see in our norms database that there are definitely diminishing returns and all media have diminishing returns, so going from a dollar to the thousandth dollar of the thousandth dollar is not as valuable as the first. That is just the nature of advertising and yes, we see that, and I don’t think we are anywhere saying that the next dollar will necessarily drive the same volume as the money that was already spent.

We are working on response functions out of our norms database to be able to help drive information on where are you on the curve and what could you expect from your next dollar.

BRITTA CLEVELAND: Can I add to that? Tomorrow we are giving a presentation that talks about print wear-out, and it takes the Ken’s Salad Dressing example that I gave to show the same advertising running over a consistent period of time and the sales continuing to increase, so we didn’t reach the diminishing returns yet with the print spend that they had.

CARYN KLEIN: I would add that we are seeing that magazines still have a long tail, and in some other work I’m currently doing (which will probably be a paper in two years) we are looking at magazines and web and tablet and mobile and video.

Our company is a media company, not just a magazine company, so we are building impact curves for each of our platforms and each of our assets, and we are creating models internally for our clients that will look at the next dollar they spend and where that should be. So it is not just focused on the magazines but it is the combination of where your content is delivered for that brand that can really extend and create more impact.

LESLIE WOOD: Your other question was about competitive pressure. We have done quite a bit of work and we can control for exposure to other media, and in looking at synergy we did. For each household we know exactly what advertising they saw, and we could look at competitive pressure as well.

There are cases where competitive pressure can have huge effect but in general there are cases where we could control and make sure that the test and control households both had the same level of competitive advertising.

JIM COLLINS: In the case of the work that we have done with the Martin agency their models at least have the potential to account for the competitive environment, particularly the agent-based model where you have a variety of different inputs to which the agents or the individuals can, in fact, respond.

GUY CONSTERDINE: One other comment on the subject of diminishing returns. I could refer you to a study published this year in the UK called “Magonomics”, published by the PPA, the national magazine association. It did a meta analysis of macro aggregated data from the databases of the media agency Mindshare in the UK, real client data but anonymised, which showed diminishing returns for media and that in general TV was expenditure that was on a shallower part of the diminishing returns curve because in essence too much of the money was being spent on TV; magazines were on a steeply rising bit because in essence there was not enough being spent on them; and the conclusion was drawn that on average you would need to spend twice as much as in magazines as is currently being spent on a typical campaign, take that money from TV, and that marginal money would deliver far more return spent in magazines on top of a limited amount in magazines than it was doing as the margin on material on TV.
There is a lot more in this very complex and interesting study but diminishing returns is one of the elements, so if you go to the PPA website, ppa.co.uk, and follow some links on research, you can download that.

Let’s move to a different question.

JAY MATTLIN: I have a substantive question for Leslie and a not so substantive question for Christoph.

Leslie, you said there was a 51,000 household overlap between Homescan and Catalina and you ended up with 13,000 households where you had complete data. I was confused about where the TV data came from. You said it was all from the Nielsen people meter panel, and you were not using set top boxes, so where those in the 13,000?

LESLIE WOOD: That’s why it was 13,000. The people meter dataset is about 35,000 in total. Of those, we have purchase data for roughly half, so that gets you to a little higher than 13,000. Once you start using purchase statics and intab statics during the measurement period, we are down to about 13,000 households that we have high quality data for.

Because this print data was census data we knew whether every one of those households were subscribers or not, and our digital also overlapped substantially with those pieces as well.

JAY MATTLIN: I didn’t realise you had such a strong overlap between the purchasing and the TV.

LESLIE WOOD: We are purchasing for half the country, so you kind of get half of it. Anything you look at you mostly get half. It is not exact, it varies by county and all kinds of things, but it is about half the country.

JAY MATTLIN: Coming to my not-so-substantive question for Christoph, did we see this right? We were buzzing at this end of the table. Did you show that 25 per cent of the searches of German women were about deodorant?

CHRISTOPH DANNE: Yes, absolutely you saw this right. It is in a broader sense; it’s not just deodorant but different combinations of different words. I can display them later on, if you would like to know.

JAY MATTLIN: I really don’t! But there are some interesting cultural differences there ...

SCOTT McDONALD: This is a question to Leslie, Caryn and Britta.

As a great fan of this general approach we have copied and emulated and adapted it at Condé Nast, but we consistently run into the limitations and problems of trying to apply it when you are dealing with high-end advertisers’ products that are expensive and infrequently purchased, so we pushed it up into the beauty category into some very perilous examples and cases, for example anti-aging serum that costs $80 for half an ounce, not frequently purchased, and we had to extend the option for a year/year and a half, very difficult to see.

So my question is from your experience, not encouraged by Leslie’s summary of the things that make it easy, I am going to ask it the other way around. How far do you see the boundary in terms of product categories, purchase frequency, product penetration and price, as applicability of this beyond grocery and fast-moving consumer goods?

CARYN KLEIN: Yes, I think it is important to look at this beyond CPG. What we need to be doing now is really delivering results overall. Each category has different challenges but at Time Inc we are now also working with credit card data to understand the impact of advertising on sale for some of
those categories which could very well include high-end retail and beauty, and some of those categories in the luxury space.

I don’t know how many people pay for their car with a credit card so there’s a challenge there, but we kind of look at it in two ways -- a more syndicated way versus a more custom approach. For the auto category and the financial category we are working with clients on a custom basis to overlay their actual sales data with the exposures that they have across our portfolio, so it is a more standard approach that we are showing with CPG but it also could be very customised, depending on the situation and the client.

BRITTA CLEVELAND: Just to add to that, we are working with Nielsen in the same area and using other databases besides the Homescan, but in the auto category -- and this is very interesting, especially given the results we have with the purchase cycle, the shorter the purchase cycle the more likely you are going to have the sales -- in auto we have a purchase cycle of three or more years and we took the methodology out to a bunch of the auto audience and asked them whether they would be interested in us making that connection for them. Interestingly, auto manufacturers were saying to us “We are not looking at magazines to drive sales but to drive people into the dealer and at increased awareness, more upper funnel type metrics”, so to continue to stay in that area would not be of value to us, Time magazine advertising to sales. So that was interesting.

But we are expanding this methodology into pharma, so we are talking about lower incidence products and also the credit card.

As long as there is a behavioural database with actual purchase data and demographics and information about the purchasers, this can be done; it is just a matter of how we take that learning and improve the plans.

LESLIE WOOD: Scott, there are two parts to your question. One was the analytic techniques, and the other is the data, so we have these two different methods for looking at advertising effects, Media Impact and Ancova. Ancova requires there to be only so much reach, so you are really confined into a period of time which tends to be 6-8 weeks if it is TV or 6 months if it is print. Media Impact allows us to do much longer periods of time because it has variable windows, so we are building analytics that allow us to look at things that are smaller if you look across longer campaign periods.

Also Nielsen has nbi, which is credit cards, so there are all kinds of other data sources that we are going into to build out single data source beyond CPG.

We have done a lot of work with cosmetics and sometimes Homescan helps and sometimes the supermarket sales are indicative, and we have to look at each case as it comes along, at how big it is and is there enough data there to support it.

SIMON BATY: We have done some similar kind of work to what you are describing, albeit in a simpler kind of way, and one thing we found hard to differentiate was, when you are looking at print plus digital effects, whether it was just an effect of repeated exposure or more frequency of exposure, or whether it was an effect of the two different media together.

ANTOON VAN DER STEICHEL: I think it is a combination of both. You have two exposures, so secondary exposure helps in attaining better ad impact, but in our research our advertisers combined both media in a creative way, which added some value.

In the Ikea example I showed you the print ad and the online banner. The print ad was quite typical for a newspaper ad in that it added some emotional aspects and dimensions, and the online ad was a video trying to convince consumers to visit Ikea for a special offer, and the combination of the two led to an incremental benefit. So it is a combination of both the secondary exposure and the two media attracting consumers in a different way.
GEOFF WICKEN: This is a question prompted by the paper from Britta and Leslie, so it is another ROI question.

In common with the other papers this morning it was a very elegant and enjoyable presentation. Britta, right at the end you showed a chart that compared ROI in Meredith with ad networks. I scribbled down very quickly $7.81 for Meredith, $2.89 for ad networks.

BRITTA CLEVELAND: $2.79.

GEOFF WICKEN: Regardless, that seemed to be quite a significant chart that you shared at the end of the presentation. Could you tell us a bit more about that? It certainly seems a very interesting area for future work.

BRITTA CLEVELAND: Sure.

As you may know, Nielsen originally worked with Yahoo to develop a product called Consumer Direct, which was a way of allowing Yahoo to show that advertisers running on Yahoo were driving sales. So this Consumer Direct methodology was then expanded beyond Yahoo to other ad networks around all digital platforms.

It was a boon. If you look back in the early 2000s when it came out Yahoo received an incredible amount of increased advertising as a result of this. So we took that methodology and worked with Nielsen to demonstrate how to do that using print rather than digital, so we are basically using the same methodology in print as in digital.

What is interesting is two things.

One is that the methodology for digital is cooking the ad, so you know the person has the opportunity to see the ad, you know it is ad focused. Whether it is viewable or not is another question but they have had the opportunity to see it. In print we are matching based on the subscriber level, so all we know is that the person received the issue, not that they saw the ad. So in some ways with print the bar is a little bit higher than it would be for digital.

The other thing is that all the digital ads we compared to, those 864 I mentioned, are the only ones that Nielsen has dollar spend available with. They have done a number of other studies, I think Caryn mentioned 1500 digital studies, but only 864 had dollars assigned to them so we could have ROIs. Those 864 digital campaigns are also ones that were targeted, so not only did they run across ad networks and portals but they were using Nielsen data to target more specifically within the mass portal, so it makes the story even greater when you compare magazines to digital when you are having those two points that make it a little bit easier for digital to get there.

Our point at Meredith in introducing this whole concept was there is a perception that digital is much more measurable, and clearly at Meredith we have a huge digital area as well so we know that digital is not easily measurable, but that is the perception, so our goal was to put magazines more in the forefront of accountability, so that comparison was I think particularly relevant.

LESLIE WOOD: Not every study is targeted in the 860 but most of them are, that is true -- the vast majority are, but not all. We know that not all ads are seen on digital; we know that they are not all viewable; our partners tend to be digital providers that tend to have very high levels of viewability and very high quality on banner advertising but that is not true cross all digital platforms. I know there have been some campaigns where less than ten per cent of the ads are actually ever seen in a digital campaign.

I also think that we have to remember that magazines tend to be extremely well engaged with and banner ads don’t tend to be well engaged with. They are not your friend that you curl up with and engage deeply with.
On the other hand there are lots of them available. They are cheap, you can buy lots of them, but what we are trying to do is put them all on a common footing, so yes, our normative database is a rich source; we have just been working for the last six months on rebuilding it so we have the same exact measures for every media, and we plan to do some very deep analysis of that data.

HORST STIPP: A couple of the presentations this morning convinced us that one plus one is three, namely that digital and magazines work pretty well together, and then we also heard about the importance of creative.

I was wondering if you would agree that maybe the research agenda going forward should focus on providing more information to advertisers on exactly how to achieve this one plus one is three. What are the right strategies to mix print advertising and digital?

We have some examples of how Ikea did it but I think more knowledge in that area would be really great. I think we have established the first point but how we get there and what are the best mixers would be invaluable information going forward.

LESLIE WOOD: Horst, I couldn’t agree with you more. Just as we had begun looking at 25 studies of magazines, we have only less than a handful of cross-media studies that have been conducted so far. When we get to the 25 number, or 15, I think we will be able to begin to share those insights of what works. Clearly creative messaging that has synergy between it is important.

We have seen sister brands that have advertising that actually hurts the sister, so if you have a laundry detergent that is all about smell and you have another sister laundry detergent that has no scent, and you air both of those ads, they are kind of cannibalising each other, so what supports the full brand, what supports each piece, what media supports each other -- clearly creative is going to be a big piece of that, but also how do you place it and how do you work it?

I think at some point we are going to be wanting to look at sequencing. Is it better to have your TV ad before your digital or your print, or is it the print that tees off?

We know that pharmaceutical ads often tee off, but then say “Go read the magazine for all of the detail on the side effects”, so we know there is synergy there but what is the right sequencing is going to be the next question, and it is a very fruitful area.

I would love to see response functions for each of the media and the response function for the synergy as well, and once we have those we begin to understand much better how to appropriately set budgets for media.

YAAKOV KIMELFELD: The company I work for has a cross-media database of 100 different studies that include TV and print and digital together. In terms not of ROI but branding impact it is available.

The reason I wrote my paper not on that but on purely the digital subject is because digital changes so quick that you cannot really use last year’s results for this year, it is just impossible, so probably the results of your study will be inapplicable in a year or two. Unfortunately I think that is the main reason it is not being used.

GUY CONSTERDINE: On the question of sequencing there is a good econometric analysis done on Swedish data by the Mindshare group. It is on the FIPP website, fipp.com. I can’t remember the name of it but if anyone wants to look that up perhaps you could email me. It is a good analysis of sequencing and print and TV, the effects of different ways of sequencing, do you have them at the same time, do you have one, then a burst of the other, then a burst of the first versus -- et cetera, it looks at that question.
Our time is well and truly up, so Gayle?

GAYLE FUGUITT: This was an amazing line-up of stories told and lessons learned from metrics and how to reach consumers, what they buy and how to reach them and it is so very helpful to hear practical and specific examples in the way that we do projects and the papers were all so well presented. There were really incontrovertible stories and metrics demonstrated that I think advertisers and other clients would be hard pressed to turn down.

Kate Sirkin was able to bring Laura Desmond to our stage for an audience measurement conference and she invited us to be brave, bold and cool, and it is hard to resist that, but I think she also well represented the global CEO who is challenging us to have metrics that keep up with the consumer, and all of these papers are really great examples of attempts trying to reflect actual consumer behaviour because the consumer isn’t consuming just one form of media at a time but multiple different forms and they have different needs, and clearly we are all trying to get at that, so I really appreciated the opportunity to moderate the second section of the Panel.
SESSION 5. EVOLVING READER PSYCHOLOGY.

Moderator: Kate Sirkin

PRESENTATIONS:

22. CONTENT USAGE ACROSS DIFFERENT MEDIA PLATFORMS.
Kristina Grütters, MEC GmbH, and Jennifer Waldeck, Czaia Marktforschung GmbH.

23. MAGAZINE READING IN THE ATTENTION ECONOMY.
Scott McDonald, Condé Nast.

24. THE DNA OF THE NEW MAGAZINE READER.
Peter Callius, TNS SIFO.

25. TARGETING KEY READERS VIA SOCIAL NETWORKING PERSONAS.
Heather Dougherty, Experian Marketing Services.

26. DIGITAL AND THE CONVERGENCE OF GENERATIONS.
Geoff Wicken, Kantar Media.

27. EVOLUTION OF NEWSPAPER AND MAGAZINE BRANDS IN THE DIGITAL AGE.
Belinda Beeftink, IPA

28. THE EMERGING DIGITAL READER.
Risa Becker and Jay Mattlin, GfK MRI.

29. BREAK MAKES NEWSPAPERS UNBREAKABLE.
Tomson J. Thundathill, Malayala Manorama.

DISCUSSION: (Presentations 22-29)

ANTHONY TORRIERI: This question is for Jay and Risa. You observe increased readership even among iPad owners, but I thought I heard you mention that that might be partially driven by the increasing number of digital titles available. I was wondering if you happened to look at that information controlling for titles that happened to be available during both periods, so, looking at a consistent set of titles that were available during both of the periods, did you see some increase in activity among iPad owners?

RISA BECKER: We didn’t look at that specifically and it might be an interesting thing for us to do. The title came about after the fact. Who knows if they have a little bit more of an impact or less of an impact, so we could do it but then we would be looking at it within those specific titles, but I think it is worth a look.

JAY MATTLIN: I think it is fair to say, though, that over the period we looked, which was really an 18-month period, the percentage of people who had read digital editions climbed from 2.8 of the population to 5.2 per cent, and the percentage of MRI measured magazines that had digital editions went from 64 per cent to 90 per cent, so the pace of growth exceeded the pace of growth in digital magazines overall.

The percentage of people who were reading digital magazines increased 87 per cent but the percentage of digital magazines that were available went up less than that. It was more like 40.
BRITTA CLEVE: This is for Scott, and focuses on the Time issue. We are getting challenged a lot by people looking more at digital media and TV so I’m just appreciating what you went through. I’m just wondering how your argument is being heard among clients you are dealing with. Are they buying the idea of the increased attention and engagement among print readers?

SCOTT McDoNALD: It is difficult to say, Britta.

I think of it as being part of the conversation also about the limitations of focusing on reach, and I think most of the systems that agencies use optimise for reach and, as a result, other factors like effective frequency and in particular any measures of engagement and the quality of contacts are undervalued.

I think many of our clients at Condé Nast fortunately are not as obsessed with reach and they pay more attention to qualitative factors, but I have to say that, overall, part of the struggle that print ad budgets have confronted over the last decade have been part of the uncritical acceptance of those kinds of merrymaker diagnostics, so I would not claim that anything that I or anyone else has done that has raised that question has done anything more than maybe slowed, in some cases, that trend. I wish it weren’t so but ...

BRUCE FRIEND: A question for Heather. I was wondering, through the data you had with Hitwise and your passive mobile and tablet data, if you saw any evidence of magazine advertising driving conversation and other activity, because if you look at television and even traditional digital that is a big selling point right now for them. They are driving the conversation, the word of mouth, and can magazine prove that with similar types of evidence?

HEATHER DOUGHERTY: I think that is a great concept for magazines to take on. For example, like we saw with entertainment, they love content and sharing content so certainly when you are thinking about TV shows, particularly the competitive TV shows or reality shows, you do see a lot of tweet or Facebook activity where people are talking about that, so it does really provide a great opportunity for an advertising partner to take part in that social conversation.

We even saw for Twitter, for example, with the travellers that were also wine drinkers that for some reason ads with Twitter seemed more effective for them, even more so than Facebook, so there is definitely evidence where that could be a really good opportunity.

Because there are not hardened metrics around it there is some reticence and some scepticism to try to take that on, but I think it does offer a really good opportunity.

We have seen they are very open to this and they like sharing that kind of information, so it could be something they could take on, so hopefully experimental types of advertising will do this.

KATE SIRKIN: I have a couple of questions. Kristina and Jennifer, you looked at engagement with different types of content. Did you look at the same time period each year, or did the different types of content engage people more at different time periods during the year?

KRISTINA GRÜTTERS: At the beginning of this study it was winter and later we changed it to summer, but we had to stop the fieldwork when some big international things happened because they changed the behaviour so much that we could not go on with the fieldwork. We had to stop when there was the Iraq war for about six weeks, for example, so that changed over time, yes.

KATE SIRKIN: Heather, have you looked at any of this data internationally or is it just US-based analysis?
HEATHER DOUGHERTY: In this case it was strictly US-based but I think it would be interesting to see how that changes across markets, particularly with some of the data that we saw about adoption by age.

In the US, for example, the average age of social networkers has increased rather quickly, so Grandma’s on Facebook and the younger kids are abandoning it, so it will be interesting to see in other markets how that could have that same opportunity, particularly as that continues to grow for the older audiences.

ERHARD MEIER: Scott, Rolf sits next to me here and we wondered whether we heard correctly. Did you say there were 14 radio sets per household these days in the States? We can’t believe that figure.

SCOTT MCDONALD: Actually the figure is a few years out of date; it is a figure from about seven years ago. It could have declined slightly since then but it is quite remarkable because in the golden age of radio the family gathered around the radioset in the 1940s listening to FDRs fireside chats which is an impression of the zenith of the power and influence of that medium but, as the television supplanted it, it just migrated into all these other places, and it is the ecosystem of media consumption. In fact the count per household -- so each individual, every little transistor, every little pair of ear buds, every computer that is transmitting internet radio, every car, every alarm clock -- are all counted, and the count is slightly above 14 as of the last record that I saw.

A shocking but I think interesting counter point to some of what we look at here.

MANFRED MARECK: Kristina and Jennifer, who commissions the work? Is it something that came out from the advertising agencies, or is it publishers that pay for it? How widely and regularly is it really used in the planning process now?

KRISTINA GRÜTTERS: We as MEC have commissioned the work for Czaia so we are paying them to do the work. We are using it quite regularly, so our media planners use on it a continuous basis whenever they feel that their media plan can still be optimised in a way. It also gives us a good way to evaluate how the initial media plan is performing.

MANFRED MARECK: Is it proprietary to MEC, or can other agencies purchase the data as well and use it?

JENNIFER WALDECK: Yes, they can buy it.

JENNIE BECK: This is an observation and a question probably for Tomson and Peter but others might want to chip in too. I thought your two presentations were fantastic in talking about the love, really, for newspapers and magazines respectively. We also saw in other presentations that the printed copies are still very important in people’s lives, but with the rush to digital are we forgetting to develop and improve the printed products too, and can we get the love back?

PETER CALLIUS: I guess the simple answer to your question from my perspective is yes to the first question, because I think publishers do look a lot at the digital development, of course, obviously, but I think at times they are forgetting, you know, the true value of the printed edition.

Scott put it pretty well when he said that the more people use digital and print together the more they realise what part of the different digital versus analog they actually like, so I think publishers should work a lot more on the printed product. Get the love back while the love is still there.

TOMSON THUNDATHILL: The love is still there; it is basically a question of making it available. For example, in our case the newspapers are available on the doorsteps before 6 o’clock every morning, and if the coffee, beer and whisky can co-exist in the same world, why don’t newspapers,
online and television? They can but it is a question of making them available and affordable. Love is still there.

SCOTT McDONALD: One of the things that is remarkable in looking at our repeated surveys of digital subscribers is the degree to which multi platform access is made available, so people have printed editions but they have access to the digital editions and they go back and forth a lot, as I said. It seems as though it is causing magazine reading to work its way more into the nooks and crannies of the day and people’s experience in time, so we are having great success in renewing them at higher prices. Usually when you take the price up your renewal rate will go down. That is not what we are seeing. We are taking the price up for multi platform subscriptions, and getting higher renewal rates at higher prices and profiting more from the consumer side of the business.

But they are better able to articulate what they like about print and you will see it year to year in the repeated surveys, so to some extent simply providing alternatives allows people to articulate more effectively what they like about the different platforms. I think there is reason to be optimistic about the cross benefit really to the consumer and ultimately, once we sort out all the measurement issues and things like that, the business models for the advertisers as well.

BELINDA BEEFTINK: The work that The Times did showed really that if you understand the context of reading occasions you can’t change the printed paper in the way in which you can change digital offering, but if you understand why people are reading the print version when they read it, then when they go to the digital offering you can then push them back towards the paper and design the content of the paper to shift people around. The Times did that brilliantly.

KATE SIRKIN: On Scott’s point about the advertising messages we need to figure out what the business model is, and advertising is still in its early stages of development to understand what people really want in those devices. We are going to hear more about that over the next couple of days.

JOHN FAASSE: Peter, you found negative correlations between net promoter score and reading frequency and it was quite puzzling. Could it not be, as I’m inclined to believe, that net promoter score in many cases and maybe also for magazines is just “crap”? Also, it might be that the ones you would like to promote your magazine to are the people in your own household, so why convince them to read the magazine? Just give it to them, I would say.

PETER CALLIUS: Yes, that could be the case but -- crap? I think it stresses the point that the net promoter score is a client service, so to speak, and in the paper we are discussing what is a customer. Is the reader a customer? Is a subscriber a customer? Yes, of course they are but we did this on readers, that is an important point, so when we looked at, for example, more frequent readers we got a slightly different pattern. That is one point.

It is possibly so that you can’t actually use a net promoter score in magazines. That is one question. Are you happy with that, John?

JOHN FAASSE: I can live with it, yes.

LEENDERT VAN MEEREM: I would like to continue the discussion with Lisa and Jay. It was a nice presentation and I was curious about the growth of digital reading in the US. I think we should be a little bit disappointed about the growth because, if I read it well, we have since 2011 tripled the number of tablets -- this is from your presentation -- and the percentage of digital reading, the offer of digital, has doubled from 46 per cent titles to 90 per cent of titles. Then, if we look at the percentage of digital reading, the percentage of digital reading in magazine readers (says the table) has hardly doubled.
So if we have one hundred percent of the population having a tablet, then we are not very much higher than ten per cent, so it is not growing. It is growing because of the tablets.

JAY MATTLIN: The second chart shows as a percentage of tablet owners it is growing. It is still below 25 per cent but it has been growing. Yes, when we started looking at the percentage of adults who own tablets, and it has grown quite a bit since, there were not many magazines that had digital editions at that point.

The context here is, and I actually cut this line from the presentation in the interests of time, that tablets are among the most rapidly adopted new technologies in recent history, so the device itself overshadows the growth in the media.

Your point is well taken, that it has not exploded with the same vigour as the device itself has.

RISA BECKER: It has been a challenge for publishers to compete with all the apps. When you have a tablet you have a whole different landscape, so there are a whole lot of reasons why publishers might be having, at least to date, a more difficult time making sure that people know that their apps are out there; to know that when you open up a tablet the Newsstand is not automatically right there. Publishers have been trying to address those. They started off trying to address it and they continue to try to address it and make it a little bit more obvious for consumers that these apps and additions exist, and that they are useful and fun to read.

SCOTT McDONALD: I would address that also. It is certainly something the publishers look at, and we have been concerned about it as well although, as I say, even when we look at the higher renewal rates and higher prices that people will pay for cross-platform access, regardless of their level of usage of the digital editions, it suggests that simply having the convenience of that access is of some amount of value.

On a tablet, when you think about a magazine coming into your home through a mail shoot it announces immediately new content. Weekly magazines come out on the same day and people are somewhat conditioned to expect them. I know if my Condé Nast does not arrive on Saturday I will go looking for it or I will download it on the digital edition because I am expecting it on a Saturday. Monthlies not so much, so the discovery of new content is a big challenge that we didn’t have. There is a lot of stuff on people’s tablets.

Push notification gets ignored. You can send emails but people get lot of email, a lot of spam, so it is a different discovery process and it involves negotiations with the Amazons and the Apples. If the next time you turn on your tablet that opening screen was your new magazine to let you know that it was there, it would be really nice, but we don’t have those arrangements yet with those distributors. It is a different process to even remind people to open those digital editions, let alone if you can solve automatic download and other little barriers that still make it easy to have the printed copy and open it up.

JAY MATTLIN: And, of course, when they do open the digital edition we have found that, on the whole, they spend a lot more time with it than they do with the printed ones.

BRITTA CLEVELAND: I just want to add two comments, one about the love of the printed version and then a segue to this conversation about why more people aren’t reading the tablet editions.

The majority of publishers are thinking digital first, and we are looking at digital as a way of getting our messaging across, but currently our readers aren’t thinking digital first when it comes to magazines. They are still choosing print as their No 1 choice, so until consumers make that shift over to the digital versions you are not going to see the results in the numbers.
What Scott and Risa were saying is that the challenges for magazines on tablets have a lot to do with the competition on the tablet, so if you are looking at an eReader, where people read books, they are more likely to read a magazine on a eReader, their reading is a lot higher, but you don’t buy a tablet to read a magazine. That is not your No 1 reason for buying the tablet.

So I think we have some years to go before we are going to see the big numbers. Forrester right now says 22 per cent of people who own an iPad or a tablet read a magazine on it, so it is not there yet and it may not ever be there for magazines until we figure out a way to mark the magazines to make them stand out when they arrive on the doorstep, like Scott was saying.

KATE SIRKIN: As a consumer the other piece is trying to link it with the Amazons and make it easy to remember your passwords. I am still so confused on what my passwords are for the magazines, I don’t use it.

BRUCE FRIEND: In terms of this conversation I look at a tablet and the research I have seen shows that people buy a tablet to watch a lot of video on the tablet, not to read, and when I look at what Condé Nast is doing in terms of getting into the video content business, Scott, do you see that as really the bigger opportunity down the road for your brands in terms of what the tablet is going to offer?

SCOTT McDONALD: Not quite, no. I think that the core of the magazines will still be text and pictures, though I think video is very interesting ancillary.

I do think, though, that, as we move more and more to 3-inch screens, that is going to invite the magazine into all sorts of new parts of this media day that I was talking about, and you just can’t shrink magazine ads to that. Selling those editions separately, in my view, is likely to be a more probable solution and some of the video content that we create is adaptable to that format, whereas I don’t see it working as well with current arrangements. But there is still so much to work out on that.

GUY CONSTERDINE: This is a comment on Jennie Beck’s question.

Jennie was concerned whether the printed magazines were being neglected in any way in their rush to digital, apart from editors not neglecting them, but the digital aspects are feeding back into magazines to some extent, and there is a lot of development on what you can do off the printed page. A simple example is quoting a URL to lead somebody into a website, but you can also make it active so you click on it and go to the website. There are QR codes, watermarks and other devices where, if you put your smartphone over them you can get a video on the smartphone and in some context that can be very powerful, especially for advertisers. There is a whole range of developments.

One of the most interesting is where you put your smartphone over the ad and it can take you straight to the buying opportunity and you can buy products off the page. That is a very powerful possibility for advertisers when it is developed and more widespread and could be part of a campaign.

So I don’t despair of the print medium; I think the actual printed page will in a few years’ time be doing a whole lot of interesting, new, highly productive things that we are only just beginning to work with.

PETER CALLIUS: I have a comment, thinking of neglect of print, because I do think there is a certain neglect of the printed product in print.

I’m just comparing when I meet with one of my television clients, their programming department, 10-20 people analysing every little aspect of how the programmes will run in their absolutely most efficient way, and then I visit my print friends. At best nowadays they still have an analyst -- sometimes they don’t any more -- and so I was very surprised and happy to hear about
Press Edge, which I think is very important, and the question how do we optimise the print brand internally, so to speak. I really enjoyed that and I do think there is neglect.

KATE SIRKIN: On that note, thank you for your attention all afternoon and your great questions and tweets.
TUESDAY 15 OCTOBER 2013

SESSION 6A. PLANNING BEYOND EXPOSURE.
Moderator: Andrew Green.

PRESENTATIONS:

30. LOVE OUR TITLE, LOVE YOUR AD?
Véronique Couvreur, Sanoma, and Jan Drijvers, TNS Media.

31. OSTA: OPPORTUNITY TO SEE ADVERTISING IN NEWSPAPERS/MAGAZINES.
Irena Petric, NOM, and Alke Bassler, GfK Intomart.

32. LIVECROSS! THE MISSING LINK OF EFFICIENCY.
Philippe Périé, Ipsos MediaCT.

33. THE POWER OF COMMUNITY-ORIENTED MARKETING.
David Shiffman, MediaVest USA.

SESSION 6B: WHAT IS THE RIGHT FREQUENCY?
Moderator: Horst Stipp.

PRESENTATIONS:

34. CLOSING THE LOOP ON DIGITAL REACH AND FREQUENCY.
Fred Leach, Facebook Inc.

35. PRINT WEAROUT REVISITED.
Britta Cleveland, Meredith Corporation, and Julian Baim, GfK MRI.

DISCUSSION (Presentations 30-33 and 34 – 35)

HORST STIPP: Britta, what is really interesting is that you did in fact find the rationale for revisiting this issue is really very clear, namely that what might have been true in the ’80s and ’90s is not true today. Are there plans to maybe look at this for different products to gain more understanding whether this is true maybe for car ads or different ads too?

BRITTA CLEVELAND: I think this is just the beginning and we would like to extend it, not only to different categories but also to multiple titles and weeklies.

JIM COLLINS: Julian and Britta, do you think the findings might have been a little different for an advertisement or for a brand that had a history of advertising, particularly print advertising, so people are already familiar with it from it having a longer history of being in the advertising market, than a brand that is basically brand new to print advertising and advertising generally?

JULIAN BAIM: It is a great question. Obviously the impact for the first time being in print ads makes this case a little bit exceptional and it is quite possible that for brands that have had that kind of exposure the results would have been different. This is why we have to acknowledge it is a case study but it is an encouraging one, at least from the idea that wear-out does not really occur substantially in print.
BRITTA CLEVELAND: Although I would add that unlike a new product that has absolutely no history to consumers, Ken’s is an established share brand, so people are aware of it because they see it in store all the time. This would be a different case study if it were a product that was just being introduced. I think we probably wouldn’t have done it that way.

JAY MATTLIN: Irena and David, one of the variables you looked at as an independent variable was the category advertising. Was there any concern from a business standpoint that certain categories would be driven away from magazines if they were shown to be less effective in the medium than other categories?

IRENA PETRIC: No, there was no concern, and the reason for that is that we are publishing the data on a title level and each title differs in which category scores the best in which target group, so you have two variables that are very important, the target group you choose and the product category. For each title we have a prediction for advertising reach in that specific category so it differs very much across titles, and what we could show you today was only a very aggregated view of the data. That is why we are not really concerned with product categories turning away from magazines or newspapers.

JAY MATTLIN: David, you talked about 153 communities and they seemed to be pretty broad-ranging. The way you look at this was really a sort of a new concept and I guess I was interested in how you defined the community. You mentioned book clubs and religious affiliated ones, but did a community have to have a name? Would it have to be physical versus virtual? What were the parameters of the definition?

DAVID SHIFFMAN: We approached it in a few different ways. It was around the topic and the way we articulated the topic to respondents. What we found was high levels of personal involvement and interest in a category was a real strong predictor of the behavioural elements that defined community and community participation. That was the basis that we defined it on. Those people on average spent, and it really varied by community, five hours a week involved in their pursuit in some way. They tended, as I showed, to talk to and share in and around that subject with 15 other people and so on and so on, so it was definitely interest and involvement driven, but with a behavioural element in terms of their participation.

JAY MATTLIN: So you didn’t actually have to have a named community? It didn’t have to be that you were involved in the Friends of The Library, or something like that?

DAVID SHIFFMAN: No. To be clear, and as we were talking about it there were different thoughts around it, there were two things they were not. They were not limited to social network communities, like a community on Facebook, although it could include that, and they didn’t have to be what I would say a card carrying member of the club to be in. It was much more about the topic and your connectivity with others in and around it.

HARM HARTMAN: I have a question on the Dutch research on the opportunity to see. It is a little bit about cementing, that is how you brand it, but aren’t we talking about already certainty to see? When you read a magazine there is always an opportunity to see the advertising still and what you are actually modelling is if people are really seeing the ad, so isn’t it too weak to talk about opportunities to see advertisement?

IRENA PETRIC: Thank you. You are now giving me the opportunity to say that there is another level we investigated which we didn’t mention in the paper. First, you have to define what is opportunity to see advertising, and we actually first had three levels that we investigated and included in this ad reach survey.

The first one was the broadest: Did people have the spread open? So were the two pages, the spread of the newspaper or magazine, open? That was the first level.
The second was: Did you see the page? The third was: Did you see the advertisement? We analysed all three of them and we decided to use the middle one, which is whether somebody has seen a page. The page was not always a full advertisement, sometimes it was a combination of content and ad, so it is not really a certainty to see the ad: it is a certainty to see the page on which the ad was. The deepest level was whether people saw the ad, and that is what we didn’t want to take finally because then all kinds of other variables come into play, like creative, like whether it is a big brand or a small brand, and things like that. So it is not really certainty: it is still opportunity, we think.

DICK DODSON: Another question for Irena. I would have thought that the pagination of the vehicle would have been an important factor in the exposure. Did you look at the pagination? Or did you find that too difficult to measure for the magazines and newspaper?

IRENA PETRIC: What do you mean by pagination?

DICK DODSON: Number of pages.

IRENA PETRIC: We did have number of pages. That was one of the characteristics of the title we took in the model, so we did have it.

ALKE BASSIER: But it didn’t turn out to be significant after the analysis.

HARALD AMSCHLER: I would like to go on with a question to the Dutch team. It is interesting to see that you go from vehicle exposure to advertising exposure, and I would like to ask you about the motivation.

I think you mentioned, if I got it right, that you were pushed by the advertiser, by the agency somehow. This model somehow reminds me of the German approach in the 90s, I think, where they introduced the reader per page with an ad on, and their main motivation was at that time to generate the precondition to create a multimedia dataset, so it was TV, radio, the other media, they forced press to go on from vehicle exposure to ad exposure in order to have the data on the same level.

Was this also taken into consideration in Holland so as to have maybe a starting point to create a multimedia dataset to have a more equivalent level with the other media?

IRENA PETRIC: Yes. One of the biggest motivators of this project, of course, was the wish of advertisers and media buying agencies to measure all the media at approximately the same level. We are still talking about apples and pears but it is at the same level. It is just more fair to compare whether somebody has actually been on the page when there is an ad instead of average issue readership, which you get whenever you just open a publication.

By the way, we know these kind of figures; it is not a surprise, the level of advertising reach, and not for publishers also, because they all have all kind of effectivity studies where they conduct surveys specifically for advertisers and they create databases with all these figures of advertising reaches of specific ads, so they know the levels.

The question is whether we will use this in direct comparison with other media and how we will do that. At the moment we are also conducting a study that has been based on how TouchPoints are doing it in the UK, so a time budget survey, and then after that a fusion of all the currencies.

We have not been talking about this yet and we are still delivering average issue readership as a currency for fusing the data, so I think I will have this conversation at lunch, because the representatives of media buying agencies are here in the room.

STEVE DOUGLAS: Fred, I thought that paper was extremely interesting and confirmed some of my worst fears about click rate and buying, but you gave me real hope. Your sales team is fairly well
influenced by print because Fabio was from our industry on the print side, so one of the questions I would have if I were him or you is can we begin to target by interest group, taking the Ken’s salad dressing point? You might not be able to target everybody in Facebook who is interested in salad dressing, but you might be able to target their interest in cooking or preparing meals at home, and it seemed like that would be a lot bigger circle for you to promote the reach of Facebook.

A corollary, taking the interest in cooking, is have you ever thought of doing some joint experiments with Condé or Hearst where they are doing exposure in the print ad? I know there are a lot of privacy issues here, but maybe trying to get the exposure of what happens when it is at a mobile point.

As to the point that I think Britta made very well, TV is a little different and visual is different yet, but print is a very active media, and Facebook is active from the standpoint of the person going to their page but I’m not sure it is active from the standpoint of receiving the ad.

I was wondering if you had done any work on that subject?

FRED LEACH: I will try to answer all three.

The first question about interest, you can definitely target on interests. What we typically see, however, is not everyone has a complete Facebook profile. A lot of people have latent interests that aren’t necessarily listed explicitly, so one of the things that our measurement has paved the way for is that ability to match datasets together in what we refer to a privacy safe way, where neither side gains information about the particular person. That has actually allowed for targeting using offline data, so you could actually target people based on their past purchasing of Ken’s salad dressing, as it were, as well as purchases within a particular category. We find that the people who respond the best to advertising on Facebook seem to be the ones who we know have purchased in the category at least before.

There are lots of interest things; there are lots of things we detect that are ephemeral that are very useful, things like when someone changes their relationship status to Engage is a great time to show them ads for wedding planners and photographers, but for the most part we are seeing that the use of offline data is more powerful than the use of interests, simply because of this issue of so many people not having them.

To the question around mobile and active consumption, we find that our mobile advertising is more effective than our desktop advertising, and the reason is that our desktop advertising is a mixture of ads that are what we refer to as the news feed and ads that are on the right hand side the more traditional display style of content in the middle and advertising off to the side.

The ads in the news feed are the only ads that appear on mobile devices and because when you are logged into Facebook you are the same person whether you are on a tablet or a phone or the website, we can compare exposure in one medium versus the other, and we think that that active consumption is very similar to print. You are scrolling through that same sort of linear advertising where if you are in a magazine you are going content and then there is advertising on Facebook and there is content and advertising and content -- it is a very similar user experience, as we would say in the digital world, so we think that that is likely to have similar impact, if not greater, to other media like television.

STEVE DOUGLAS: And joint ventures between print?

FRED LEACH: Absolutely. We are very interested in working together. We fundamentally believe that cross-media exposure is the most important in terms of delivering relevancy as well as delivering impact to advertisers, so I think there are some interesting ways we could partner, particularly within the print world, because so in much of your readership you have very high quality identity information, so names, addresses, those kinds of things, that can serve as tools to join with
independent third parties who can do this in a privacy safe way, so we are very interested to partner with folks on that.

MAX KILGER: David, first of all, a really important topic so I’m glad you are looking into that. I thought it was a really nicely executed analysis.

Two quick comments and then a question.

I’m not surprised to see the outward and inward factors that you found in the analyses, and I think if you think about those and think about the relationship between those two and how someone is trying to place themselves in the world by reconciling those two things, that might be a real opportunity for advertising to help people sort of facilitate that integration between those two factors.

The question I have for you is I didn’t see brand community anywhere in the communities. I drive a jeep and jeep owners are a close knit kind of community, so can you say something about brand community and why we didn’t see that?

DAVID SHIFFMAN: Great question.

One of the things about community is there is this give and take and to and from, I get what I give kind of thing, which is absolutely interesting territory from a marketing perspective.

In the quant study we purposefully did not include brand communities. What we did there is we really looked at how people are interacting with brands within the communities and what are those relationships between community and brand.

In a lot of the literature review we did and a lot of the qualitative work we did investigate brand communities, and they absolutely exist. We felt there was a different purpose here. We absolutely think there are opportunities for brands to build communities around the brand and to be able to act against those and to be able to do lots of things to drive brand value, but we specifically wanted to focus on how brands and marketers and content companies can think about the opportunities to be a part of something that is there today, and leverage that.

RICHARD SILMAN: Two questions, if I may, firstly to Irena and secondly to David -- and Irena, I’m really sorry, but I have to ask this based on what you have said.

Given where the drive came from for this data and now the data is available, I would be really interested to know whether there was any "stakeholder resistance" to the data and how you dealt with that?

Secondly, David, following on from one of the comments Jay made, it comes as no surprise to me that one of the most engaged communities, and I think possibly the most engaged communities, was what you called religious groups, but religious groups covers a number of faith groups which hold different attitudes, behaviours, and engagement levels. Is the size of that community sufficient for you to go into that and look at that in more detail?

DAVID SHIFFMAN: That one yes, we can, and you are absolutely right, there are a number of different types of religious communities. We tried to aggregate it up on numbers. In a similar fashion when we think about some of the things we did from a sports fan perspective, there is absolute truth to every team fan is going to have differences and nuances versus other teams.

One of the things we are doing as a follow-up is to start doing things in a little bit more of an aggregated way and start to drill in to, for instance, music, which is another one, there are many music sub cultures, so we are starting to drill into music sub cultures and individual teams and individual
religions, or other opportunities where we want to really understand the smaller, tighter pieces that do exist, absolutely.

IRENA PETRIC: Let me answer your question.

First of all, the data is not yet published so at the moment I am having a kind of tour, visiting the stakeholders and having quite big discussions with especially the publishers, as you can imagine. The big thing is to explain to them what this data means and how to use it. Of course they are afraid how the data are going to be used by the media buying agencies so, let’s say, there is a lot of stakeholder discussion at the moment.

LESSIE WOOD: David, thanks.

I hark back to about five or so years ago when the conversation was all about engagement and this feels like really we have moved engagement into current real life today. What does engagement really mean? It is being part of a community, and I love the thoughts about how that is going to relate to print and media. Because being engaged and involved makes us think about my magazine or my TV show. There is certainly that community than with a brand, so good work. Excellent, thank you.

I also have a question for everybody to consider and think about. I have been doing a lot of thinking about reach and frequency, and we think of those as two opposites, you know, the more reach, the less frequency, but when we think about cross-media we think about time and sequencing, as we talked about yesterday, when I’m exposed to first a TV ad and then a digital ad, is that digital ad a new reach or is that a second frequency? I would say it is a different kind of frequency, but it certainly is frequency more than it is reach. Do they have to be within a week? Or four weeks? How does timing change how we think about this?

Maybe we need a more nuanced way of even talking about reach and frequency, that they are not actually one or the other. They are in one media but I’m not sure where we start talking about cross-media that they are really opposites.

Any thoughts?

FRED LEACH: I think you are absolutely right in terms of thinking about exposure across media as being generally more multiple frequency rather than administrative reach.

We have done a few studies with Nielsen using their cross-platform campaign ratings system, where we look at exposure across television as well as Facebook, and at least then in terms of looking at advertising effect it seems like we should think about multiple exposures more in terms of frequency.

The point about time is really interesting, I think. We don’t have enough sophistication yet on Facebook in terms of how people think about flighting over time, but there are all these interesting notions of do you start in one medium and then go to another? Do you build up your TV launch and then extend it in other platforms?

All of these are great questions that we hope to answer in the next few years, but you are on the right framework.

LESSIE WOOD: It is like we are doing lots of work where we say this is what one media delivered and for the next media, let’s say digital, how many more people do you get that you didn’t get the other way.

But then, after you have delivered somebody a digital message and they later get a message in radio or they get a message, how do we think about all that? What is the value? How do we quantify, even help, media planners think about what is actionable and what is not actionable? What can you actually
do? And with targeting being in each household, particularly in digital, you have all kinds of opportunities and, if we knew what was best, we could actually execute that way.

BRITTA CLEVELAND: One thing to add: the creative messaging or what the message is in each of the different media will determine what role that will play, so the message in digital may be completely different because it is delivered in an environment that is different from that of print.

The other point is that, speaking about reach and frequency, when you are adding another media to an existing one you are typically reaching the later viewers or readers of the first media, so you are adding reach as well as frequency to a different group.

If you run consistently TV you have a diminishing return, you are reaching the heavy viewers. If you are adding print to an all TV schedule you are going to add frequency to the lighter TV viewers which you wouldn’t get with TV.

LESLIE WOOD: Right. And when you think about this whole concept of synergy it is so related to creative and so related to whether the messaging builds, and we do know that some people respond to sight, some to sound, some to smell -- whatever, and the more ways you deliver messages to different senses the more powerful that message is.

Certainly there are pieces in there as well. There is a wild west kind of feeling to me in this area that we are all touching on but not yet moved into.

HORST STIPP: I think you have identified a great research agenda for the future to keep everybody busy for another couple of years here!

TOMSON THUNDATHILL: On the Dutch paper, what was the time lag between the first contact and recontact, and is there any technique you have used to correct this?

IRENA PETRIC: If I understand this correctly you are asking about a time lag between the survey and when people read their newspaper or magazine?

In the survey people took the magazine and the newspaper and at that moment we also showed the displays of the pages, so it was actually a kind of recognition, if I’m honest.

There was also a filter question for people to qualify for the survey, which was whether they read a newspaper or a magazine in the last publication interval. They also had to take the paper into their hands at the moment, so there was no forgetting.

GILBERT ST JOANNIS: How do you take into account in your model the level of exposure to advertising? Consequently, according to you, does the level of exposure have an impact on the visibility of advertising?

IRENA PETRIC: Let’s do that during lunch! Are you talking about possible multiple exposures?

GILBERT ST JOANNIS: Exactly.

IRENA PETRIC: We didn’t take that into account, if I’m very short. We showed them a spread and at that moment we also asked them about multiple pickups, which could be something to encourage multiple exposures, and we took those into account. So multiple pickups were taken no the account but we didn’t really correct for multiple exposure.

HORST STIPP: Our time is up, and I want to thank the presenters.
SESSION 6C. VIEWABLE IMPRESSIONS.

Moderator: John Faasse

PRESENTATIONS:

36. THE ADOPTION OF VIEWABLE IMPRESSIONS.
George Ivie, Media Rating Council.

37. DIGITAL CAMPAIGN PERFORMANCE METRICS: NEW BENCHMARKS.
Josh Chasin, comScore.

38. TWO WAYS TO MEASURE DISPLAY AD VIEWABILITY.
Douglas de Jager, spider.io.

PANEL DISCUSSION AND GENERAL DISCUSSION (Presentations 36-38).

JOHN FAASSE: One thing I would like to know really which did not come from comScore is how good are we now at measuring viewability? Can we measure 90 per cent? One hundred percent? In the first Media Rating Council surveys it came about that some vendors were able to measure zero per cent viewability of an ad campaign and in other cases 77 per cent. I guess and I understood also from George that we have improved since, but are we now able to measure one hundred percent of viewability?

GEORGE IVIE: I’m sure that Josh and Douglas want to comment on this but I will add my two cents.

Yes, things have improved substantially. First of all, vendors have innovative, new approaches, like, for example, the work that spider has done. There are also enhanced information sharing arrangements that occur between some of these vendors and publishers that allow the communication that iFrames break, so we have seen measurability rates creep up.

Another thing we learned is that as you live you get smarter and when we wrote the served ad impression standards, which is now over ten years ago, a lot has changed on the internet, and we found that we are going to have to remove some cases from what we used to count as served impressions because now we have better knowledge about what is rendered on the page, and we were counting some impressions that we should never even have counted as a served impression, now that we have good knowledge about that, and if you take that out that comes out of the denominator of everybody, whether it is served or viewable, and we have to make that change to the served impression. So the bottom line answer to your question is measurability rates have gone up.

Now we are worried more about vendor comparisons, because if you are a user out there and you want to hire comScore to measure, or spider, or double verifier or whatever, you see a lot of differences in the counts. That is our main concern at this point; helping the market place assimilate why counts are different between vendors that have viewable measurement approaches rather than just unmeasurability. We have to handle that and then we think we are ready to go with display, certainly.

JOSH CHASIN: I want to add a couple of things. First of all, one of the requirements or standards that the MRC applies when they accredit viewability providers is that you are to report known viewable, known not viewable, and disposition unknown. There really aren’t mysteries for the users of the solutions of accredited services.

I will be very candid with you: right now comScore, when you deal with iFrames, directly observes 75 per cent of impressions. We have a projection algorithm figure for the other 25 per cent. We
expect to be directly observing 100 per cent of impressions in early 2014, but I would caution that, while there has been a lot of emphasis on the struggle to see it cross domain iFrames because it has been a problem, we all know that technologies in the digital space change overnight.

I don’t think a year/18 months from now the issue when we look at viewability solutions is going to be to what extent can you see it across domain iFrames. I think solutions will diffuse throughout the eco-system. The question is going to begin to focus, and I think rightly so, on false positives and false negatives.

You can, or can claim to, see into impressions, are you right all the time. George mentioned that the MRC is going to shortly undergo an initiative where they reconcile the dispositions of different providers presumably for the same set of impressions, and I think that will be very helpful in helping all users to understand the accuracy of the different solutions.

JOHN FAASSE: So, if I’m correct, if you report 53 per cent of advertising is on premium sites, that is based on measuring 75 per cent of cases?

JOSH CHASIN: Let me be clear about this. Think about the TV ratings. In the TV ratings system you have maybe in the US 35,000 people meter households, so you are measuring the behaviour of 300,000,000 people by seeing the behaviour of 70,000 people. We report on every impression; we directly observe 75 per cent of the impressions, and we have a projection algorithm of 25 per cent.

DOUGLAS DE JAGER: During the MRC audit we were over 90 per cent. It is not just a matter of the viewability technology; there are other things that need to be considered, and these will be considered with the MRC over the next few months.

One of these, for example, is data collection. If you excluded viewability entirely from the measurement and all you were going to do was drop a pixel clientside, so the ad gets served, the ad includes a particular pixel that calls out to another service, if you just used that little pixel we have seen talking to ad servers that you expect around 90 per cent of the impressions that are served you will be able to monitor just with a pixel.

There are questions about data collection independent of a viewability, and the question firstly is when you say 75 per cent of the impressions you have insight into, is that 75 per cent of the ads that are served from the ad server, or 75 per cent of the time that you recognise that your script is called from the browser, because your script will be called from the browser fewer times, probably 90 per cent of the time that the ad is actually served.

JOHN FAASSE: George, in view of the fact that different companies have very different capabilities and different methods of measuring viewability, you are likely to have very different viewability figures regarding which company you use, so do you think it is wise to lift the ban on using viewability as a currency?

GEORGE IVIE: Good question. It depends on who you talk to. Some of the buy side people have called, we get calls every week expressing frustration at why this process is going so slowly, and then we have sell side people saying you guys are crazy, you are moving like a bullet, so we are trying to strike a balance.

We are proceeding in a scientific and rational way. We are committed to not lifting the advisory until we have a good understanding of the accredited vendors and how they compare to each other and reconcile them, and have great measurability rates hopefully among the providers.
The one thing I would say is just keep in mind we are talking about two concepts. We are talking about your ability to measure viewability, and then out of all the ones you could measure whether ads were actually viewable. Those are two different things and they interplay together.

What worries us is the measurability rate, and we were seeing ad campaigns across a wide swathe of 3-4,000,000,000; we saw very low measurability rates at that time, and at internet speed that study is now getting very dated. We are trying to clean that up.

We are not playing on the field of making sure that everybody’s ad is viewable; we just care whether the technology can measure whether an ad is viewable or not. There are natural marketplace forces that will do things like ad networks that have less than ten per cent viewability. They are going to get a certain type of advertising or none at all, and that is a natural force that I don’t get into.

Then there are premium publishers and others that may have very high viewability rates, or they are going to adjust their sites so that viewability is maximised. They may end up benefitting from this.

The one thing we know that is a natural law is there will be less supply so, where you had tons of supply in the digital space, now you are going to have less supply because viewable is less than served. It is a natural line. What does that mean to pricing? Probably pricing will go up -- I don’t know if temporarily but in the long haul more money will flow because you get greater efficiency over a smaller amount of inventory.

STEVE DOUGLAS: George, I mentioned to you before I was reading Adam Gerber’s comment from ABC Digital, a very good piece in Media Post talking about his concern, and I guess he would be viewed as a premium site, but reading his concerns I thought your presentation did a very good job of reducing that concern and laying out the timeframe that some of the concerned publishers might have.

It seems very reasonable to me. I don’t think I missed anything but I was not on any of the calls that you three might have been on when Adam was making his point, so if you didn’t cover any of the things he was questioning, perhaps you could.

My question is to comScore and to Doug. What are the different levels of viewability? If I were ABC Digital or Forbes.com what would my number be on comScore versus spider? What would be the percent difference?

My frame of reference is when we had recent reading and through-the-book it was 70 per cent greater for monthlies on recent reading and 30 per cent greater for weeklies on recent reading. George, is there any kind of range of how big those differences are depending on painted versus what comScore does?

GEORGE IVIE: I am familiar with Adam’s piece and Adam is in the ITF and has been vocal. In fact, we had a meeting with IAB that we ran where Adam was one of the speakers.

Adam’s concern is a lot of the long form video providers like ABC television network in the US are repurposing long-form content on the internet. They want you to come to their site and view a show you might have missed on television. Those are very long shows; they have ads embedded in them typically.

Those appear quite often in apps and I was very careful in my presentation to emphasise that we are focused on in-browser measurement of viewability. We have already written a standard on in-app advertising, and you can find that on iab.net. That talks about advertising being much more viewable in an app environment based on our experience so far, because apps naturally centre the content, you only see one app at once, you don’t have things like tabs over the top of apps, et cetera, so I think we have addressed most of Adam’s concern.
He was concerned about us moving through this browser-based environment and painting the app environment negatively based on what we have seen in browsers, and we were trying to be responsive to that.

As it relates to vendors what I do know is the vendor measurements are converging. If you look two years ago versus today the vendor measurements are slowly converging with each other and this reconciliation process should help that. They are never going to be exact, there are different methodologies involved, and at some point if you are a user you have to look at these vendors and say: “Well, there are certain advantages to this vendor so I’m going to pick them” -- and I’m not just talking about higher numbers; I’m talking about how they will work with you, how they tell you and inform you the circumstances around how an ad became viewable -- because keep in mind you want to improve that, so you need intelligence around that. That is how these vendors are going to differentiate each other, not just by pure measurability rates.

DOUGLAS DE JAGER: You mentioned Forbes and we have actually looked at that. The different approaches vary in two different ways. When the paint measurement method classes an ad impression as viewable, then the geometric position method classes the ad impression as viewable also. It is almost a 99 per cent match there. There isn’t a match as strong the other way, although it is close to about 90 per cent, and the key difference is that typically the ad impression is at the top of a page. The difference comes about because with the geometric position method you can pick out the position in advance of the ad creative being painted to the display.

Our measurement only starts when the ad creative is being painted to the display. Typically we have seen that flash creatives that are run on Forbes, and Forbes is quite a heavy site, take three quarters of a second before they render. Our measurement starts at that point. The geometric method will have started earlier, which means if the user has scrolled down and they want to get rid of the ad that’s at the top of the Forbes page, we will class that as not having been in view for a second and potentially that ad creative will have been classed by the geometric position method as being in view for a second. That is the principal difference.

There are some other ones which centre on programmatic inclusion of iFrames, but that is typically an implementation problem where the script has failed. It is not anything to do with the method that has been used, and that is something that has been corrected and I think over time there will be convergence on that.

JOSH CHASIN: I don’t have any exposure to the results that spider has generated so I can’t comment on how the numbers would look if both solutions were run on the same set of ads.

I will say that the experience with the comScore approach that Douglas is describing has not been our experience at all.

Douglas’ whole paper was about intellectual property and the different approaches, and I know that historically the PDRF loves a good recent reading versus through-the-book shoot-out. I fear I cannot oblige you -- I truly can’t!

First of all, and this is all I can say, comScore’s capabilities as represented in Douglas’ paper were not accurate, and I cannot talk about technology or intellectual property because there is ongoing litigation. I have been deposed on the subject and I simply cannot discuss these things in a public forum. We are happy to discuss them privately with clients -- and this isn’t news. I told Douglas and George and John this before the Panel. We are constrained in speaking about this stuff publicly because of ongoing litigation but I will tell you that the characterisation about comScore’s capabilities in the paper are not accurate and I can’t speak for the other vendors.

GEORGE IVIE: I want to make a comment, slightly changing the subject. For the folks in the audience, there is incredible learning coming out of these viewability studies being done by the
vendors. The two vendors here are both good vendors so this isn’t a comment to favour vendors, but we are learning things. For instance the types of pages that we thought had highly viewable, highly exposed inventory are maybe different than we thought. So you buy something on the home page of a site and you think that is highly viewable, highly exposed because thousands of people go there but in reality you have to look at the underlying usage of that page. Sometimes home pages are more like indices or tables of content.

An easy example: I go to yahoo.com and instead of seeing everything that is on their page I know on the left hand side there is Yahoo Finance, so I go there immediately and I click on that and I go to Finance and I see an article I want and I spend a ton of time reading that article, and maybe an ad below the fold in a financial article is the most highly viewable ad in that stream, and that isn’t what we thought going in necessarily.

So what I would urge all of you to do, if you are not doing this already, is find a viewability vendor -- I, of course, favour the accredited ones -- start working on how you assess your site and your digital properties on their viewability, and learn about how you can optimise on it. That is a message. It is different than what you think it is.

JOSH CHASIN: I just want to say I one hundred percent echo George’s sentiments. Absolutely.

JOHAN SMIT: George, first of all thank you very much. In the Netherlands I am part of the discussion deciding which feasibility standard we will use, and we have about three weeks before the first data on the new online research will appear, so I have three weeks to help people make up their minds.

So far we have always felt it was like an arbitrary discussion because we could not find any data supporting one thing or the other, we representing agencies and also to a certain extent advertisers.

We started with 3 seconds 75 per cent, and we thought we could go down from there, so I will definitely make sure that everybody for the next meeting, which will be in the course of this week, has read your paper and hopefully we won’t spend more than five minutes discussing it, so thank you very much.

One question. You take for video a certain length, whether it be 5 seconds more or less I don’t know. Why don’t you take a percentage of the total video length as a measurement?

GEORGE IVIE: Very good question, because we started with that. We are on I think the 8th draft, these are tremendously debated standard setting opportunities, so we are working with this group that Josh mentioned, the EITF and the IAB, the Emerging Innovations Task Force.

If you are a member of an IAB anywhere you can get on that task force, so I would urge you to join. But we are on the 8th draft, and in one of the first drafts we proposed it actually was a percentage of the video ad (I think it was 25 per cent that we first proposed) and then we analysed the data. I mentioned we looked at 10,000,000 video executions, which actually in the digital world isn’t that big. We have more datasets coming to us, there are going to be billions of impressions, but the bottom line is we found that by working with a 5-second standard, and it may involve 3 seconds or something like that, basically you accomplish roughly the same goals.

If you have 25 per cent you have video of varying length -- and keep in mind we are talking about the commercial, not the content, so what we are setting would be 25 per cent of the commercial length versus, let’s say, 3 or 5 seconds, and at that point in time we haven’t seen materially different measurement counts, so we decided, one of the cornerstones of what we write is trying to be simple. If we have a viewability standard for this type of ad, a different one for this type, for this type, it becomes very difficult to implement, so we are writing a general standard that is trying to be as simple
as possible, and we have decided in looking at the data that centring on a fixed number of seconds is a much simpler thing and it accomplishes something similar.

If you are in discussion with your Dutch counterparts about this, we have some presentation decks that lay out the results of the billions of impressions we looked at. It has some nice data and some charts, and it is not all in the paper, but if you want to exchange information we can get you some of that.

Keep in mind that is US experience, so you have to be careful.

JIM COLLINS: First, very nice presentations all around.

This is kind of a technical question for Douglas. Rather than using your adjacent pixel search method to determine the boundaries, have you ever considered sampling, let’s say, 100 random pixels from the iframe, computing which proportions have the high and the low rate and using that for the viewability determination?

DOUGLAS DE JAGER: I haven’t explained how you move around those pixels.

What we are trying to do is remove any uncertainty, and this is a point probably worth noting for publishers and for advertisers, on how viewability will change buying in the future. A lot of people suggest to us that the fact that 30 per cent, 40 per cent or 50 per cent of ad impressions are viewable and at least half the impressions are not viewable is already priced into the market. This is not the case and it isn’t the case because of uncertainty. If you think about it, if you toss a coin ten times and I ask you how many heads will you have, on average you will get five heads but sometimes you get zero heads and sometimes ten, and it is the same for viewability.

The problem advertisers have, particularly with targeted campaigns, is you may only hit your target 20 per cent of the time or sometimes 80 per cent of the time, and you have no control over that at all.

In terms of the approach to moving the pixels around, our approach throughout is to remove as much uncertainty as possible, but yes, if you did do that, and I guess this ties into the question that was asked earlier about how vendors differ between each other, if the difference is just down to probability then that is probably not a good thing.

ANDREW GREEN: On a slightly different subject I think there are a dozen or more readership surveys around the world now which are fusing their measurement of printed readership with an online service and, as far as I know, there has been no definition or attempt to say when you have a website hit, if you like, on a publication website. I think it can be as little as a second or whatever the viewing standard is.

Do you think this debate about viewability has anything to say about whether we should tighten that definition?

If, for example, you have a one second on a publication website and the readership survey says you have to be looking at or reading a printed copy for at least a couple of minutes, it means that the digital copies are going to get a very high audience proportionally versus the printed copies.

I wonder, given all this, does it give us any more perspective or direction to say there should be slightly tighter definitions on the definition of a reader of a publication website?

JOSH CHASIN: We do some fusions with the print services, for instance with MRI and Ipsos in the US and PMB in Canada and several others around the world, so that is a fair question. As you probably would surmise, the goal of the fusion is to generally maintain the currency levels on each side, and you are absolutely right, the definition of in-audience on the digital side is very different from the definition in print readership.
When we work with the print studies our mandate has typically been that the publishers want to understand the total footprint. It is interesting, though, that the phrase I keep hearing is “total footprint” and not necessarily “total readership”. That is always an issue with cross-platform measuring -- that the experience that the consumer engages in with the content is fundamentally different across platforms. There probably is a point to be made there.

GEORGE IVIE: You have to keep in mind that the work we are doing right now is setting a minimum standard for counting an impression. Between the buying and selling marketplace I expect that that will not be the only measurement that involves digital. There will be a minimum standard for counting an impression, but a marketer may come into this and work with a vendor and say: “Look, I only want to count my digital impression if somebody is through all the way in the video”, or halfway through the video, and we don’t stop natural marketplace negotiations. We are only setting a minimum standard.

Also the next set of standards which we have already started is a digital GRP standard. We are already auditing products and writing a standard for digital GRP and then cross-media GRPs, and that is where the whole thing about you need to improve television and other media comes in.

All of that is on the docket; this stuff is really hard, and cross-media comparisons is one of the hardest because you have to resolve issues on all sides. I don’t have a magic answer, but it is tough.

MAX KILGER: Douglas, what happens when or if the browser authors suddenly decide “Browser optimisation? No, we don’t need that”. What happens to your process, your measurement?

DOUGLAS DE JAGER: The process is going the other way, so it is increasingly the case that browsers are being optimised, and it is because of two trends.

One is the application is getting richer and richer and it is also the trend towards mobile and tablet browsing, which means you have limited memory and you have limited processing, so the technique that we have developed also works across mobile, and we are in the process of putting together the production version now.

As you say, ultimately at the end it applies to all methods. If the browser vendor decides to come up with something entirely new then things do get broken. Our experience so far though has been the other way around, that more browsers are adopting the same optimisations.

JOHN FAASSE: We have come to the end of this session. I thank all the speakers for their contributions.
SPECIAL PRESENTATION: ARF-PRDF CO-OPERATION

SCOTT McDONALD: It is now my job to reintroduce Gayle Fuguitt and Horst Stipp, both of whom have been on the stage before.

As I indicated previously, Gayle is recently appointed to the Presidency of the ARF, and that was occasion for some early conversations about whether ARF and PDRF might be able to collaborate a bit more, so I thought it would be a good idea to put Gayle and Horst on stage to talk about that before we head off to lunch.

GAYLE FUGUITT: Thank you, Scott. Last night there was a bit of a mixed vote between whether people wanted to hear who and what is the ARF and what is a router. I am going to leave the routers to the technical experts and I am going to share with you a few brief slides and Horst is going to chime in on the ARF experience.

What we are about is categorising growth. We believe that research tools can be rebooted and among the rebooting are discussions and conferences like you all have created. We want to reimagine research and we really want to re-invent our readership skills and our tools for relevance as we go forward.

Five months ago when I started my role at the ARF I found myself at a lunch with Scott McDonald and Dawn Mitchell and Andy Brown and we spoke about the relationship that the PDRF and the ARF could have because the ARF is very interested in having a global presence, many of our members are global, and the PDRF is interested in increasing the role of print and understanding print and print digital, and we at the ARF really want to make sure we are known for being about television advertising, so it is a very important combined platform for us.

So who is the ARF?

By virtue of numbers we have over 400 members. We are a 76-year old organisation. We were created by the four As and the ANA, which are associations that were asking to be able to have a research arm. We have over 60,000 documents that have been collected over the course of those 76 years. We stand on the shoulders of so many research leaders that have chaired our committees, our councils, our board of directors, been Presidents including Scott McDonald and many of you in the room. Currently George Ivie and Kate Sirkin are members of our board of directors.

What differentiates us is that we represent media companies, marketers, ad agencies and research companies, and this is our board of directors. If we go back just about every one of these companies is a global company.

This is the must have slide for 2013, the consumer is in control; big data is big inundation, it tends to lack big insight, I would say. I think it also, though, portends to big opportunity.

Growth is slower domestically, and I can speak to that having spent 32 years in an advertiser, and it is complicated abroad. To grow globally you need to have more than just a footprint of distribution. The supply chain has become the buy chain; the consumer is in control. I heard about that at the ANA conference last week, it went from every CMO, but the voice of authenticity and insight is what is needed, and in a lot of cases lacking, and that is a big part of the opportunity as we grow globally.

What you all have here is your discourse and discussion and the kind of tools you are putting together, and our conferences and tools are things that we want to connect to, both to get the voice of authenticity of the consumer but also to get these really important techniques that unlock opportunities and the ability to measure opportunities better.
Global, mobile, social, local all represent new advertising touchpoints but they also represent a revolution in the way that research is being conducted today, so at the ARF we want to be at the leading edge of new opportunities and we want to be able to bring examples of work that is been done and is being done that you might not have access to, so you don’t have to do all that work yourself.

This is clearly a complex environment and calculating our lives, as we heard yesterday, is a challenging thing for us to be doing.

I was given an opportunity to stand on the stage and I’m the only thing that stands between you and lunch, and I decided I really wanted to bring a message to the industry and the research industry, and that is about collaboration.

One of the things I decided to do differently when I got to ARF was, rather than just hunker down on 432 Park Avenue and try to figure out what is the original research we can conduct, and what is our secret source, what are we going to bring as our association, I decided I wanted my mark to be to step out and be a collaborator. One of the first things I did was stand on the stage of what might be considered a competitive conference, the ileX conference in Philadelphia, and I spoke about collaboration, and I’m here with you today, and Horst is here with me because I believe that, as a research organisation globally and an insights and analytics organisation, if we don’t get together and collaborate we are not going to be able to have the kind of impact that is our opportunity.

So why do we find it such hard work to collaborate? I am putting some conference programmes together and I have had people say: “Gayle, I will tell you this but I’m not going to say that on stage, because I don’t want anyone else to hear it”.

Maybe it is the fear that collaborating with the enemy is somehow a traitorous activity, but I think there is a real opportunity for us to consider it because we are under such complex and fast changing times and the world is shifting so quickly, that I think we have an opportunity to think of ourselves as being in a co-creation experiment and an opportunity for us to get together and try things together and share learning, and get under a functional cover, and do what I have heard has always been a mark and a famous aspect of this forum which is to have debate and discourse, and not just say “I agree with what was said there and I agree with that”, and have nice conversations, but to really have rigorous debate about what we think is needed and who is going to create the solutions, and then how are we going to get those out and push them across the industry as quickly as possible, which people have to do -- that is all of us as leaders, and that is the invitation.

I’m going to quickly go through five examples of things we are doing at the ARF and then Horst is going to speak about our agenda, our original and curated research and some future projects we have under way, and then we will head off to lunch.

First, we are really all about building industry association, collaboration, and helping navigate this vast industry landscape, and by no means do I have global agencies represented here. I don’t have the logos of many of you in this room on this chart and just about every time I show this chart somebody runs up and says “You didn’t have me on there”. This is what we are trying to navigate as an industry and get together and I’m going to work really hard at doing that.

In addition we have many of these member companies on our board of directors, so we share our agenda.

We believe there is an opportunity to multiply our impact, and the way is by creating white papers but then also engaging discourse in our conferences. We have three conferences: Rethink is our largest conference, March 25-28; our Audience Measurement Conference is in June, and in a few weeks we have our Industry Leader Forum.
These are our four key areas that we are pushing out right now. The first is the digital world, so we have a field guide which is to help navigate digital. We have Foundations Of Quality 2, which you heard about yesterday.

Dr Horst Stipp is the leader of Neuro 2, taking a look at biometrics, and then we have Discovering the Streaming Audio User.

We had three events at the ARF during ad week, and I would have to say we had a mobile event, we had an event about an Ogilvy winner with Delta Dental and Brand Keys Robert Passikoff, and then we had a streaming audio event, and streaming audio was by far and away the most broadly attended and we had some of our board meetings there, so it is really important to branch out into these other touchpoints.

Now I will ask Horst to speak.

HORST STIPP: Thank you, Gayle.

You may remember that on Sunday we heard a summary of the Foundations Of Quality project, and if you were in San Francisco two years ago I had the privilege of telling you a little bit about the first FOQ project we had.

For the rest of this year, and for 2014 and maybe beyond, we are identifying now our research priorities for curation of visual research, and the way we have been doing that is at strategy meetings with our board of directors, and we have broad themes identified and we are going to specify and finalise them further in an upcoming meeting with our Executive Council.

I am going to tell you about these broad themes and I think you will realise and agree that these are all things of big interest to you. That is the foundation of Gayle’s invitation for collaboration and the positive feedback that we have been getting from you.

Topic No 1 is mobile. We have already started on that in three different ways, based on the feedback that we got. We have three areas of interest. One is how consumers are using mobile, what does it mean in their lives, how do they see advertising, and what are these touchpoints all about?

Second, ROI, allocation of mobile for advertising and creative in the context of mobile and all these things.

Third, mobile as a research tool. You may remember I commented on that on I think Sunday that’s we had seen some studies suggesting the possibility that mobile might be a really good research tool to measure use of newspapers and magazines and other media.

Topic No 2 is marketing mixed modelling and allocation of ROI, and we heard about that topic here too. We think there is room for improvement. It is an area that is of great interest to other people, and we have the Industry Leader Forum coming up at the end of this month that focuses on that topic, and we will further define how we will engage with that topic on the basis of that meeting.

Topic No 3 is cross-media, cross platform, and I don’t think I have to say more about that because we all know that is an ongoing topic and has been a priority in the last couple of years. It will continue to be a big priority and I guess eventually will sort of combine with mobile.

Last but certainly not least a topic that I have not heard very much about today and that is exactly the reason why Gayle has identified that as an issue that she thinks the ARF should engage with more which has got a lot of positive feedback from our members, and that is creative. We have been talking a lot about media plans and frequency and all of these issues, and a lot of presentations could be used to help advertisers use the medium more successfully.
That is something that advertisers really want to hear from us and we think it is an area that has been a little bit neglected.

So those are the big topics. In all of this we want to have a global perspective, not just looking at the US, and finally we want to have a multicultural perspective and raise awareness of cultural differences, both in the US but internationally.

Back to Gayle.

GAYLE FUGUITT: So we are going on an experiential learning journey. We are seeing that competitors are willing to collaborate. At our first board meeting under my leadership at ARF we had Facebook and Google collaborating around the topics for mobile. We had a bit of a mash-up at our last conference on this whole topic of mix, so we are going to convene people for our Industry Leader Forum in a couple of weeks.

We have created what we consider to be a conversation rather than a conference, and we are certainly inviting partnership with the PDRF to be part of workshops and dialogue, but what we did is we invited people to have a conversation, a tabletop discussion, and then write their ideas behind social, mobile, cross-platform, big data research of the future. We had inspiration boards at our last conference and have installed them in our board rooms so we really are listening, and we keep the voice of our members front and centre.

To that end we would like to offer and invite all of you, if you are not a member, to become a member and share with us any interests that you may have about learning more, submit a paper, join the conversation, change the game.

When I was able to meet with Dawn and Scott, Dawn said “Perhaps, Gayle, when you get your feet under the table, we can talk about how to extend our partnership”, and we have been having more conversations about collaborative workshops and content so we can make sure we are representing each other’s interests in the spirit of collaboration.

So I would like to close by inviting all of us to reinvent ourselves together, imagine how you can amplify your own voice through partnership, choose partners, build skills, join us at our conferences, and we plan to have more presence at your conferences.

Yesterday Leslie gave a very touching tribute to Erwin Ephron, and I didn’t have the pleasure of meeting him myself but I know he has been spoken of in great terms and there is a tweet that said he was a genius in making complex things simple and impactful. Clearly he was a leader who would be proud of us if we went forward and mentored the next generation of leaders, and took all our complex papers and ideas and turned them into three words or three bullet points, and we went out and represented growth in industry and held our heads high and recognised that, by being the voice of the consumer at the decision table, we are uniquely able to drive global growth.

Thank you very much.
WEDNESDAY 16 OCTOBER, 2013

SESSION 7. HYBRID DATA STRATEGIES
Moderator: Josh Chasin.

PRESENTATIONS:

39. DATA FUSION.
   Elie Aoun, Ipsos MediaCT, MEAP.

40. INCORPORATING METERS INTO THE TGI SURVEY.
   David Greene, TGI, Kantar Media.

41. SIMPLE APPROACH TOWARDS MEDIA BRAND MEASUREMENT.
   Izabella Anuszewska, Millward Brown SMG/KRC.

42. MEASURING MEDIA CONTENT ACROSS SEVERAL PLATFORMS.
   Geir Engen, Norwegian Media Businesses' Association, Knut Arne Futsaeter, TNS Gallup.

43. THE FOUR STREAMS OF PRINT READERSHIP.
   Peter Callius and Niklas Ekman, TNS Sifo and Peter Masson, Bucknull & Masson.

DISCUSSION (Presentations 39-43)

JOSH CHASIN: One question to the panel, if I may. What is the one interesting or surprising thing that you learned about the print brand reader when you extended measurement from print only to print plus digital?

PETER MASSON: Really the different nature of the two vehicles, and also the different way we measure them, which is a serious problem here. The measurement of print is a static measurement, it is an average issue measure, it is a model as if it happens all at one time, whereas the digital world measures on a panel basis second-by-second, and it is quite difficult to make the two work together to produce an effective package, as we were describing.

KATE SIRKIN: You have all focused on the issue of reach versus engagement in the conversations this morning but nobody has mentioned, unless I have missed it, programmatic buying. Once the print brands move online your competition is very different from the print brands you deal with offline. The question we are facing from most of our clients is what do we think about programmatic buying and then premium contextual buying. What does the Panel think about that?

PETER CALLIUS: That is exactly the point. This is a print conference but had I been in a media research conference I would have put it another way.

That is exactly the point, and it is very clear in the written paper that we do believe that, in digital, publishing houses need to do these things because if that is the case they can actually charge a premium. If they are, let's call it, forced into programmatic buying, it will just be a CPT game really, so that is the reason for it.

GEIR ENGEN: Our members are met by agencies coming up with RTB solutions. From our perspective it is extremely important for us as publishers to be aware of what is happening but to be aware of our position in a value chain, so what we encourage our members to do is work together to understand how RTBs or programmatic buying is working but also to explore the possibilities of being
a provider of your own as a publisher, where you can also combine your data together with TNS into profiling, because cookie-based profiles aren't good enough, as we see it.

So what we are trying to do is work together with TNS to show our strength, which is to combine the premium data sources with cookie-based profile.

HEATHER WHITE: This is a question to the whole Panel.

There is a lot of talk about metering and adding meters together for passive measurement, but I didn't hear anybody talk about how they were dealing with behaviour at work with passive measurement.

Obviously for newspapers a lot of behaviour and reading when you look at traffic happens during the day and during work days. How are you coping with getting that kind of information, particularly being able to profile that information and really deliver cross-media platform information?

KNUT-ARNE FUTSAETER: Like in Sweden Norway also have a very nice panel at work. We can compare the figures at work to the whole population because we have page use in a total market, we compare it to our panel, and the indexes are between 90 and 110, so we have a very good panel at work and the weighting is not so heavy.

We don't use software. We have cookie tracking, and we put a lot of effort into panel measurement and talking to the respondent.

The only places where we do have problems are places like the Norwegian Defence Department and some banks, but usually not so many problems.

IZABELLA ANUSZEWSKA: I would also like to answer this question. In our assumption we used the data already present on the market, and if internet audience measurements cover at-work usage then that will be combined in our study as well.

As far as I know nowadays it is not covered but, if there is this kind of assumption, of course we can show the total media brand covering as well as at-work usage.

DAVID GREENE: We do not cover browsing at work at all. Certainly on the TGI questionnaire we ask about the different locations people use the internet, but for us it was a question of priorities. To try and track websites from work was simply a step too far at the moment.

JOSH CHASIN: I want to say something briefly on this topic because naturally at comScore we know a thing or two about measuring work.

What I think we have learnt is that there is a perpetual challenge with getting your passive meter on work machines because there are certain work environments where the user simply can't, for a number of reasons, download the meter.

I mentioned earlier we had moved to a hybrid technique where we integrate site centric census measurement with panel based measurement, and in a very real sense the impetus for that was the desire to do a better job of measuring work usage, and it actually began from a conversation we had with some newspaper publishers in Canada.

GEORGE IVIE: I'm curious because my experience base is mainly from the US, and particularly in the paper from the two Peters and Niklas, and I think the Norwegian paper, there was a lot of cookie tracking involved. In the US we have a serious issue with cookie deletion and how that impacts things like frequency capping and your ability to track longitudinally.

Do you have any comments? I'm curious about the rates of cookie deletion you might see in your country and how you deal with that.
KNUT-ARNE FUTSAETER: I think you have to put your resources into panel management and the validation process. We validate the figures on a daily basis and if we see that cookie deletion has not been there in 28 days we send them the new cookie, and if they are not resetting they are not part of the panel. So the validation process is there and panel management is the key issue.

GEIR ENGEN: Briefly, TNS also uses local shared objects, which is a more sticky cookie. If they discover that they have lost the cookie several times they go in for the process of using sticky cookies, which is okay as long as the recipient consents.

HARALD AMSCHLER: I have a question to the whole Panel.

For me it is clear that the publishers like the concept of total audience, but how is this concept embraced by the advertisers and the agencies? Because normally they are more looking at the advertising level than the vehicle level.

What is your experience now you are offering all these total audience figures? What are the advertisers and the agencies doing with it?

PETER CALLIUS: I guess that is just the point. For a publisher the notion of total reach is very important because it shows that the bird is flying, so to speak. To an advertiser I also think it would be interesting but more from a brand perspective. It is not good enough for a media planning situation because a media planning situation is a lot more complex than calling something total reach. That is why it is fine from a rhetorical perspective but not from a media planning perspective.

I was silently very happy to get a media planning related question because we have not had a lot of those in the conference, and it is fairly important because it is the missing link from readership research data into ROI with media planning in between.

HARM HARTMAN: Peter, we have seen in this session two strategies -- one is use of data fusion and the other is calibration -- and what we have heard is that fusion is sometimes necessary because when you want to have all the granularity of all the websites you need passive measurement so you have to fuse it.

Is your method, what you are supposing with your virtual diary, only possible with the recall method and single source data calibrated to other sources, or is it also possible in a data fusion set-up?

PETER MASSON: The virtual diary is normally used in more developed countries to integrate or bring in the control data from a currency survey and to simulate that currency within the NRS. It is not any kind of fusion: it is simply an expansion of each informant's data record in the NRS to make it look like he completed that currency survey. He didn't, of course, but it gets very close to it.

There are other situations in less well advanced countries where you don't have a currency to link it to. It can still do the same job of creating from day after recall a long-term set of data, which is, first of all, a week diary which we then expand to an n week diary.

JOSH CHASIN: Thank you, everybody.
SESSION 8. FUSIONS.
Moderator: Peter Callius.

PRESENTATIONS:

44. MOBILE MAGAZINE APP AUDIENCE ANALYSIS.
Jim Collins, GfK MRI.

45. MAKING ‘SINGLE-SOURCE’ WORK FOR CROSS MEDIA.
Peter Masson, Bucknull & Masson.

46. "DIFFERENT FROM YOU AND ME".
Ian Garland, Milton Data Pty Ltd, and Babette Lazarus, Condé Nast.

47. FROM SINGLE SOURCE TO BIG DATA.
Josh Chasin, comScore.

48. PROBABLE IMPRESSIONS: HYBRID WEB PLANNING.
Harm Hartman, Ipsos.

DISCUSSION (Presentations 45-48)

STEVE WILCOX: Peter, first of all, it is very important to acknowledge that data fusion doesn't always work, but I think maybe you are suggesting that it can't work, and I think that is wrong. We don't speculate. We always do our best to validate fusions and we certainly don't overclaim, but I do have a question for you, Peter.

Is it not true that in the virtual diary system there is still some sort of model with assumptions to get from higher level single source duplications to the lower level duplications we need in the final dataset?

PETER MASSON: Yes, there is. You have more direct at the day and the week, and we have the duplication patterns at the three hour level at a generic statement from respondents, so we know their positions in terms of their frequency being on the internet at certain times of the day and certain times of the week, which means that in the process when we allocate them we will check that frequency that they are there, we attach a probability before they get allocated, and they get allocated according to their probability. So we do have quite good control over that, but it obviously is weaker than the direct measurement at the day and the week level.

As I pointed out in the paper there is a degree of contamination through the calibration progress because, if you are bring in some people who are less frequent viewers or visitors, that could indeed contaminate slightly even at the week and the day level the duplication patterns.

I hope I didn't give totally the impression of being against fusion because we use fusions and certainly ascriptions a great deal ourselves. It isn't as secure as one would like it to be, rather than the fact that it gets it wrong. That is the point.

HARM HARTMAN: Why do you use a diary? Because you can get all those patterns from passive measurement. Why do you need a diary? I don't understand. Why do you still want to do this with recall?

PETER MASSON: This gets us a bit involved in media planning.
Traditionally we only use probabilities to expand the coverage levels for multiple insertions for print, and we use a probability model to do so. That probability model has had many discussions in these sessions and it has a lot of problems in the number of circumstances where the events of reading or visiting are not independent from each other. So the dependency problem is there, and the second problem is the time problem.

When you use a probability model essentially you lose all the elements of time. The seven insertions you put in are the same whether you spread them over seven weeks or one week. It makes no difference in the probability model.

You are going to tell me we can go to a polynomial model but that is very recent. So why, then, do we make a diary? The point is we are trying to reflect in what we do as if someone had been monitored by a panel or had answered a 7-day diary, and we reproduce that. That gives us a time dynamic within a week and we don't use probability, we then count that data. It is diary data.

We then use a fairly heavyweight model to take it from one week to n weeks, but in that process we still aren't able to distinguish week to week to week. In the planning model we have, a planner can put different weights of advertising in a week and get the overall cume, but he can then still break down and see what each week produced as if you were counting a long-term diary.

There is one more advantage. If you treat it as yes/no data, as it is in a diary, that means if you put an insertion in a title and then put another insertion in the same title you are able to reflect the doubling of the gross and no change on the net, unless you are using some kind of APX probability for advertising page exposure, in which case that would move up within the issue.

So you have a very strong media planning reason because the probability model does not allow you to do that. Those are the reasons that we work with a long-term panel structure.

LESLIE WOOD: Peter, I took a bit of exception to the blurring of the line between single source and fusion. A diary can be considered single source but I think today really that is inappropriate blurring.

When we say "single source" we generally mean things with big data and things that are transactional data that is collected passively. Fusion is quite different than single source and I think diary measurement should be a third category, not sort of automatically lumped in together.

PETER MASSON: We have a language issue, I suspect, between us. Single source in the European context always meant combinations of media. Your original single source was even to have TGI type data linked into the data. Now you are saying that single source is now including big data.

Don't get confused by the word "diary". All we are doing is reconstructing what you would normally collect from a panel. When someone is answering or being monitored on a panel you have his behaviour minute by minute or quarter hour by quarter hour, and you can build his behaviour over the week in relation to a title or media and count it. That is the beauty of it. It is simple data. You can simply count the interrelationships and frequency distributions. That is all we are trying to reproduce.

We are not going back to saying you must use diaries; that is not what we are about. It is a much simpler and more effective form for media planning, and it gives us these other advantages that I have just explained.

LESLIE WOOD: I do believe that representative panels and currency quality panels are critical to being able to use big data, but the combination of them is really quite different than something that is not. We need to come up with better terms so we distinguish between the different methodologies. I don't think our data has any trouble looking at duplication patterns. Reach and frequency are certainly a very easy measure for the single source that we use. We don't have any of those issues.
DICK DODSON: My question picks up on Peter's point about duplication but is actually a question for Harm.

You said in your presentation or gave reasons why you use column wise but one of the dangers of column wise is you will lose the duplication between the vehicles.

You then made a very quick comment "this can be taken account of later", or something like that. Could you explain how?

HARM HARTMAN: The nice thing about the Chaid-based fusion is that Chaid is looking for all relevant relationships, so you don't have to limit it to the shorter demographic variables alone. We do it in iterative runs, so in the next runs you can use all the other titles as well to see which titles are interrelated.

When you look at the trees individually you see that the relations with other titles is very strong, so those kind of relations are replicated using this Chaid-based fusion.

DICK DODSON: So you can't use that for the first vehicle because there is no vehicle data on the recipient survey but, once you have used the first vehicle, you then include that in the future Chaids, and as you move the vehicles across you can include the Chaid analysis? Because you have to have the same variables on both surveys to do the Chaid.

HARM HARTMAN: There is also a language difference here. What we provide is a probability based survey. We are not modelling this on-the-fly from vehicle to vehicle.

The fusion is iteratively running, so first you get a first estimate and then it is looking for other relations as well and so on, to establish a database where all the important relations are copied.

GUY CONSTERDINE: My question is for Ian and Babette. I was very interested in your study because you tried to do what in the UK we have been trying to do, namely fuse comScore data on to a readership survey. In the UK case it is the Natural Readership Survey.

I'm particularly concerned about preserving the duplication levels between the print and web platforms of publisher brands. As I understand it, you preserved the target levels through a two-stage process: you did a fusion and then, because the duplication levels were not what looked correct for you, you did a second stage, some form of ascription, to match target levels which you got, I believe, from the IAS survey.

We looked at doing this second stage of ascription but we didn't because we had no external measure of the "correct" duplication levels that were suitable for this purpose, whereas you had the IAS.

There are two parts to this question. One is could you describe briefly the principles involved on how you did the ascription in that second stage, and, secondly, Babette, in the market place have you found any resistance or problem with using the data in that the duplication is based on recall data from the IAS survey, because recall was used for asking the web questions as well as the print questions?

BABETTE LAZARUS: We haven't yet used the fusion data in the market place so I don't know what the response is to that.

GUY CONSTERDINE: Do you anticipate any difficulty?

BABETTE LAZARUS: I do not, really. All the people we are dealing with that are buying media are not always so technically inclined in that way, and once the planning tools are in place they just operate on what they have. If they use this fusion data and they use other studies like this, I don't anticipate a lot of resistance.
IAN GARLAND: The point worth reiterating is we didn't actually control duplication at all but it was one of the measures we used to determine the success of the fusions. I'm sure all the practitioners will say you don't just run through a single fusion; there is a range of iterations. The iteration we used at the end was one that gave us something that preserved the duplications as much as possible.

Coming back to your specific question, once we did the link and identified the strata that we needed to impute, we then allocated the proportions of individuals within the strata using effectively an ascription process that said we wanted to match not just on individual demographics, which we tried to do as much as possible, but also on two elements. The first is we matched on the sites that were common, for example, if I was a New York Times reader and a GQ reader, that worked for both the donor and the recipient in the ascription process and we tried to preserve that.

The second, which is even more important, comes back to not so much the inter platform duplications but the inter vehicle duplication on the comScore donor dataset because, if comScore are saying that the duplication between two websites, for example, GQ and New York Times, is X per cent, in the fused dataset we want to preserve that as much as possible as well.

This is all in the paper if you want to look at it, but the ascription process then tries not just to match on a standard scoring algorithm, like any of the fusions, but also by finding the person we can donate the most sites to in the ascription process. For example, if I have an ascription process that says "I have excess visitors" in terms of, say, the New York Times and GQ and Sports Illustrated, I can find a range of people that match me on a demographic and other readership title perspective, but by preference I donate those three excesses to a single individual, if possible, so that you try and preserve the duplication. That is not doing it necessarily with regard to the readership or the print title, but what it's doing is preserving the duplication as such, as you are bringing it together when you are calculating it.

Does that answer the question?

GUY CONSTERDINE: Yes, thanks, and I will certainly read the paper.

RICHARD SILMAN: Peter, a question for you and a quick question, Josh, to follow.

Peter, apologies, I may have missed it, but in constructing the day part and segment data, do you compare that to any information gained, either through a recontact of some of the Orvesto sample or through something like an equivalent to a TouchPoint survey?

PETER MASSON: We have control data that comes from the MMS currency panel, so we know exactly minute-by-minute ratings, and they are averaged for the period that we are working in when creating this average week.

We have, as we explained earlier, the day part control duplication from our second question, and we have one further element that I didn't explain.

Television viewing is not a random in-and-out event, so when we allocate people to quarter hour segments we look very much at the run of viewing, which we can take from the television control panel data, as to how long people would in that period normally be viewing. So we don't allocate them into one quarter hour; if they get a quarter hour they get a run of quarter hours. So we are also reflecting within each of the day part segments the cume pattern that you would find also in the currency data, so it is a pretty good replica of what goes on in the panel week.

RICHARD SILMAN: Thank you.

Josh, thank you very much for your paper, which I really enjoyed, but my question follows on from something that Babette highlighted which is that, when you look at the Ipsos affluent data and start to
break it down, there then become significant differences in behaviours as you move from the affluent through the ultra affluent to the wealthy, and particularly the amount of time that the wealthy still spend with printed media -- hurrah!

Can you look at doing further break out of income levels beyond the $100,000 so we can start to fuse on that basis?

JOSH CHASIN: Richard, an interesting question. I have already taken the homework assignment from this conference of looking into doing just that, in large part from speaking with Ian on Sunday night, and I think we are going to try.

There is a point where you question the veracity of the income data, especially when you get too high, and also when the cell gets too small to break out as a weighting variable. That said I think we are going to think about at least going from 100K plus to 250K plus. That is one of the things I am going to take from this conference to bring back to my colleagues.

JULIAN BAIM: Just a follow-up really on your question, Guy.

First of all, MRI does fuse with comScore as well so the issues in duplication occur in our study, and you are always going to have difficulty reconciling. As Ian indicated, there were times when the website and survey agreed or was relatively close to the data from comScore, and there were many other occasions where there were inconsistencies. Once those inconsistencies exist, if you are going to maintain the total website levels and the newspaper or magazine levels, the duplications are going to vary from your survey, so reconciling that is always going to create some problem, and the question then is which do you believe in.

Also, again, when somebody recalls website behaviour and the numbers are particularly lower than you find on passive data, who is it that you are missing? Are you missing those people who are spending very few seconds on a website, or again going through a search engine, not going directly to it? So it is a much more complex problem.

Jim Collins is the one who does it so, Jim, do you want to further expand on that?

JIM COLLINS: Let me amplify two points.

This for us arose when we initially did the MRI/NetView fusion which began 5 or 6 years ago, and the question from publishers was "What's my duplication?"

One of the things we first observed is that it was not monolithic among publishers what the duplication expectation would be. Some publishers had a complementary expectation, that is, consumers of the hard copy also consume the site. Others had completely competitive expectations, that people either consumed the content, the hard copy, or they consumed it on site, but not both, so there was not a single expectation with respect to that.

The second point that I would emphasise is there is not always a complete, if you will, synchronicity between the hard copy and the internet in terms of content or branding. Not to pick on any particular publisher but, for instance, there is Time magazine in the US and there is CNN, and some of that Time magazine content goes out to cnn.com, et cetera, but it is not necessarily the case that there is this one-to-one relationship and hard copy magazine direct internet site; there is oftentimes on the direct internet site an integration of multiple, different brands for the publisher, et cetera, so the question of duplication becomes a very complex one.

Let me also amplify what Julian is saying. We have for virtually all of our hard copy magazines (about 200) some measure of internet exposure to that site, so we can in our own data, based on recall, look at that relationship and we certainly consider that relationship as matching variables in the fusion,
so we use the individual magazine's sites to the best extent we can as matching variables to attempt to preserve the, if you will, real but unknown relationship between hard copy readership and comparable internet viewership.

Let me also comment on Dick Dodson's question, because it is a very intriguing one. With many of these approaches that attempt to do column wise fusion, if you simply did individual column wise fusion then the duplications would be really jeopardised, but to the extent you can use iterative approaches based on some of the stuff Don Rubin did 20 years in the C values attributions, or these MCMC techniques where you go in and say: "Here is the data we know, we are going to try to recreate the correlation matrix", et cetera, then that really enhances the column wise approach that is undertaken in this case, and Point Logic has done some work in that regard.

So you can really say "We will start with column wise but then we will attempt to construct, if you will, the row wise relationships, but they are very iterative approaches".

JOSH CHASIN: A brief comment on the question of measuring recall versus metered or site centric.

One of the key differences between the web and hard copy print is the way that consumers discover content. If you look at the sources of traffic for websites, it is not analogous to a magazine where somebody sits down and says "I'm going to see what People magazine website has to say today". The primary sources of traffic are typically search and social, so consumers hit upon websites without intending to go to that specific website and not necessarily knowing the website they are at all the time, so that compounds the challenge of trying to integrate recall-based and digital measurement.

YAAKOV KIMELFELD: I have two questions, both to Josh.

One is about mobile devices. You mentioned you duplicate the single household based on the IP address, so when that same mobile device goes outside and accesses wireless networks and uses multiplier IP addresses to get internet, how do you identify that?

The second and related question is census is always about sites; you mostly mentioned sites in your presentation. What about apps? Apps cannot be tagged, each app is individual, how do you deal with that?

The next question is philosophical. Moving from the paradigm of one device per household, one device multiple people to one person dozens of different devices, what is the philosophical implication of all of this for measurement?

JOSH CHASIN: Taking the first question, the SDK that publishers use from us when they tag their apps creates a unique identifier in the app on the phone, so we are able to use that. We use that instead of a cookie which is why we don't need to have a static cookie on the phone.

Once we identify the devices associated with a specific IP address/household then we are able to track that phone regardless of how it is accessing the internet. If it comes out of the household, uses the carrier network, for example, or a wifi, we are able to track that.

The third question was?

YAAKOV KIMELFELD: The philosophy of one person multiple devices -- whether we still want to get to that single person, or whether there should be some different paradigm coming in.

JOSH CHASIN: I'm not sure if my answer is going to match your question, but let's see.

When we sat down to figure out how to build this dynamic panel, we wanted to get down to personal level measurement so that we understood the complexity of it. Dealing with the multiple person
The complexity of disentangling multiple users per device and multiple devices per user is extremely complicated, and that is why we try to limit the task out of the gate to the maximum extent possible to single devices, single persons.

I will not claim it is perfect. We understand it isn't. My philosophy has always been best in class or state of the art out of the gate and then constant improvement, and that is what I hope we can accomplish, but these are incredibly complicated questions and easy answers don't present themselves.

STEVE DOUGLAS: Jim, George Ivie got me thinking yesterday about the power of the app when he was clarifying the concerns that some of the publishers have. It struck me that the app audience might be closer to the primary audience of a publication because the person has picked the app and goes to the app like he goes to a mag printed title. Have you given any thought to that? I think that is an increasing source of circulation management.

I know our firm is the largest circulation outsourcer in the United States, we handle 200 titles, and I know I'm going to get that question when I get back.

JIM COLLINS: To amplify that, you have the whole notion of authenticated readership so the hard copy subscriber basically can, for a nominal or no charge, get availability to the app.

I think the business model for apps is a different business model, or a potentially different one, than internet and it is a business model, as I suggested at the beginning, that may be closer to the hard copy, both who have subscription revenue and potentially advertising revenue.

There is also a sense in which the app is a relatively personal experience usually on a relatively personal device. Certainly publishers are better equipped to comment on this but I think the dynamics of app consumption and app use are probably closer to the dynamics of hard copy consumption, and the business models are also more complicated, at least I think that is part of the expectation.

That said, the apps are not constrained in terms of their content delivery, advertising delivery, et cetera, to what can be delivered in the static hard copy version, but the similarities are great.

That is maybe all the more reason why we need to incorporate demographic and consumer targets on to app measurement, because that is certainly the tradition out of which hard copy sells, and it would certainly be of substantial benefit to publishers selling advertising on their app if we had those sort of metrics available, because they are more consonant with hard copy.

PETER CALLIUS: I have tried to follow the tweets which have streamed in, and I found two of them to be quite interesting -- not necessarily in the context of data integration but more from a philosophical point of view.

The first was the speed tweeter John Faasse, who said the media environment is changing far too quickly for media measurement to keep pace but we keep trying, and a couple of seconds later Kate Sirkin was referencing Josh's presentation saying: "Great sentiments about our business. Practical and helpful. While never perfect, it is the way we keep up with consumers". So I leave you with a big thank you to all the interrogators. Thank you.
SESSION 9. INSIGHTS FROM MOBILE.
Moderators: Katherine Page and Marion Appel.

PRESENTATIONS:

49. SWIMMING UPSTREAM: RE-INVENTING RESEARCH ON TABLETS.
   Helen Katz, Starcom MediaVest Group, and Molly Elmore, Insight Express.

50. READING APPS IN MOBILE ENVIRONMENTS.
   Max Kilger, Experian Marketing Services.

51. IMPACT OF THE MOBILE REVOLUTION
   Kristin Luck, Decipher.

52. MOBILE APPROACHES TO UNDERSTANDING MOBILE READERSHIP.
   Beckie Goodfield and Sarah Gale, Ipsos MediaCT.

53. EVOLVING CONSUMER MOBILE STRATEGY
   Pat Pellegrini and Gita Ashar, Pelmorex Media Inc/The Weather Network.

55. BEYOND 'HOW MANY?': PERFORMANCE DRIVERS IN DIGITAL ISSUES.
   Rory O'Flynn and Tatiana Gabor (via Skype), Time Inc

56. PASSIVE MEASUREMENT OF PRINT REVISITED.
   Jay Mattlin, GfK MRI.

DISCUSSION (Presentations 49-56).

MARK McLAREN: Jay, thank you for that very interesting talk. It is interesting to bring up perhaps the limitations of reverse stream data in looking at magazine readership, but it seems to me there are so many compelling reasons for it, not the least of which is being able to get down to smaller niche magazines. I'm not sure if you can answer this, or any one else on the panel or one of the publishers in the room, but when do we think we will have available a commercially syndicated reverse stream measurement for print in the United States?

JAY MATTLIN: Mark was actually my co-author on one of the RFID papers a few years ago. As you saw a lot of the potential issues that need to be resolved in order for that to happen require activity on the parts of publishers and suppliers that are kind of beyond our control, so I would be loathe to tell you an answer to that. Maybe somebody else on the Panel would hazard an answer to that one.

MARION APPEL: Or someone in the audience?

Next question?

GEORGE IVIE: My question is for Rory. First of all, great job on the paper. On the charts that you showed that showed the length of time spent with the ads and how that extended out in kind of a long tail, many years ago we dealt with an issue in the internet about the last page view and how you can't tell on the internet when somebody leaves the page. I know the issue isn't exactly the same in these e-readers because you essentially turn it off and you do have more continuous stream of communication, but I'm wondering, for example, filtering out the times when the view of the ad was the very last event before either power down or close-off, and those ads might be a little different in nature, how would the chart look if you took those out in terms of the long tail?
RORY O'FLYNN: The dataset we are working on hasn't taken that into account. It is not that the issue is not relevant at all; obviously, as you say, it is less relevant than it is on the web because you are assuming that the last page was that ad page, and there are many other pages that could possibly have been that last page, so it is a much more distributed issue, and there is probably no way for us to do that with our data set today.

We can probably explore that on an ad hoc basis but probably you would know very well the very complex and convoluted process that we have to go through to get that data in the first place.

One of the issues with that is that what you can do after you have pulled the data is just not very flexible. We have essentially pulled that data and put it into a database, and that is where it sits, so it is not very flexible.

We could probably look at something after the fact but not with our current data set.

STANLEY FEDERMAN: I certainly understood why your app would get a lot of engagement, but I don't understand why you felt that engagement and reach had to be one or the other. Traditionally weather radio and cable get enormous reach, and I would think with a little extra promotion perhaps on your own television station you would get an enormous attendance to those apps and get both engagement and reach. Why is it one versus the other?

GITA ASHAR: It is not one or the other. Reach is important but reach with applications, because there are so many applications today that you can download. You might download an application and never use it, or you might come and take a quick hit, check the weather and get out. That does not really focus with the immense content that we have and the engagement that we need with the advertiser.

In this case what we are really looking for is people coming there and staying and enjoying our data, even though it is weather. It is boring, it is weather, but we want to continue to build that engagement with our reach audience.

PAT PELLEGRINI: That is a good point. It wasn't meant to be mutually exclusive but to say what we are trying to do with the content and the creative and the strategy was more emphasis on engagement, whereas traditionally in television people would get the forecast and then keep circling through the channels. So it wasn't as big an issue on the web; it is easy to keep people circling.

On mobile we are trying to move the content over, and we are not. You have to pick a horse, and get people engaged and immersed and work on the advertising strategy that way. It wasn't so much mutually exclusive as it was a decision that we wanted people to stay with the content and keep working on it. Thank you.

HORST STIPP: I have one question about research and one about fashion.

The research question is related to Kristin. I think I heard a challenge there that in a couple of years, or maybe right now, we should start creating surveys optimised for mobile and then, after that, adapt those to other forms.

My fashion question to Kristin is, if these surveys on mobile have to be short and simple, how do we keep them from being grey?

KRISTIN LUCK: That was a question that someone asked me right after the session. We spend a lot of time telling clients what they can't do on a mobile device, and obviously we get more positive and receptive feedback when we explain the power of the mobile and what you actually can do, and there are a couple of different things.
One is to really improve respondent engagement. I think we have struggled as an industry, particularly in the last 10/15 years I have been in the business, with increasingly more disengagement with respondents. We have abused them, we haven't treated them well, we have delivered really boring surveys in an online environment that is capable of much more, so I see mobile amongst other things for making shorter surveys which increases respondent engagement, but also most mobile devices are incredibly powerful tools. Most of the mobile devices we are doing surveys with are touch screen, which means you can get away with just having little radio buttons or check boxes, you can move to more of a touch screen format, and you can create more interactivity in the surveys than we have traditionally seen in online. You could not do that in an online survey.

So I look at it more as an opportunity, and more opportunity is to have creative dialogues with clients than we have been able to do in an online environment.

HORST STIPP: So how about the first part of my question? Do we need to start designing surveys for mobile?

KRISTIN LUCK: Absolutely. It is interesting because even though we are showing in general roughly 20 per cent of respondents coming in from a mobile device, we still have a tremendous number of clients saying well, I can't really optimise my survey for mobile, I'm not ready to do that, can I just keep mobile users out of the survey? The answer is that today I guess you can, but six months to a year from now you are not going to able to, so we have to started redesigning the way that we communicate with people on these forums.

It's just not good enough to say let's wait six months or a year, because six months or a year is going to come very quickly, and we are going to start losing more and more representation in our sample as we start taking those people out of that sampling population.

SCOTT McDONALD: I want to extend that point a bit more because at our websites, for example, the per cent of traffic on websites -- and this is really new, within the last year -- coming from mobile devices is anywhere from 30-50 per cent, and that was not true a year ago.

The standard practice still is that you create a survey that is usually far too long with way too many questions, designed for a PC, and then you say, well, maybe we can create a version of it where it will recognise if it is a call from a mobile device and be optimised for that, but as the world's getting further along the track toward more mobile use of the web, and particularly for young target audiences (which we have many of), it is not very far away until we are going to have to completely invert that, and that is going to be no long surveys and none of what we saw earlier today where you show the creative on the tablet and then say "Go to the website and fill out the survey". I think it's a very big problem.

KRISTIN LUCK: It is interesting because the situation that you just discussed, where you are taking an online survey and trying to slap it up on a mobile device and have it rendered correctly, is the same mistake that happened when we started moving from phone and face-to-face research to online. We basically took a 1970s phone survey, slapped it online and said "Oh, guess what, now you are taking the same survey online", so we never really harnessed the power of that online environment to engage and keep respondents interested.

Now we have an extra challenge ahead of us because we not only have to re-engage respondents but we have to redesign the way we have been designing surveys today.

SCOTT McDONALD: So the challenge is it is almost as though the default has to be the mobile.

KRISTIN LUCK: Correct, and I mentioned that in my presentation. Everything we develop now is what we call mobile first development view. It has to work on a mobile device first and then we worry about how it is going to look online, so mobile first.
MARION APPEL: I would like to take the opportunity to discuss something that is nagging my mind because it transfers this discussion from how to do research to how publishers communicate with their readers.

We can see that mobile is the future; we can see that in the future, as it is now for a lot of younger people, the way in which they want to consume news, information, et cetera, is completely different from what we are used to as publishers, communicating in the form of articles or, as we have our paper magazines, trying to transfer that into replicas. Will that be the future? I would like to ask your response from the floor here to where we are going, and is it the best way to look into what has happened to replicas? Or do we really need to rethink the offer we are making to our readers?

KRISTIN LUCK: I'm not particularly in the youngest demographic any more but I get probably almost one hundred per cent of my news from Flipboard now. I primarily read news on my phone. I'm not even buying magazines any more -- except for Vanity Fair, I think.

It is interesting the way we consume media is changing very rapidly and that was my comment earlier, that it really is a revolution. Our industry can be slow and evolve but the fact of the matter is we are being left behind because of technology.

Somebody tweeted earlier that the evolution of how people consume media is happening at a much faster pace than how we are measuring it in this new world.

GITA ASHAR: To add to that, it is not only mobile but it is the connected consumer. It is everything. It is smart TV, it is a chromecast, it is really the ease with which you could access data today that you would not have had before which is where it is taking us. It is our ability to get data faster, quicker and more easily that is changing the way we consume it.

BRUCE FRIEND: I have a bit of a prediction which is I think this Panel which ended this session, the mobile panel, will be in two years leading the session.

It is an important point about moving surveys on a mobile but it is also about using the form factor in a way that is not about surveys but can still capture really good insights. I work for a company, Vision Critical, and most of our clients in the room here have communities where they have subscribers who are already pre-screened, so they are not asking 5, 7 minutes of screening questions; when they get to a mobile survey it is a shorter survey because they already have the information they can pass through and use.

The ability to use devices to get the pre-screened information and then append that to the survey or to the interaction we are getting the insight from is really where the business has to go and it is going, and a lot of companies are doing it.

We are seeing responsive design happening, where most of the advanced survey platforms are being developed right now, which basically means that the survey gets optimised regardless of the hardware or the operating system, and the survey could look very different on one device versus another device depending on the size of the device, the operating system, the browser, et cetera. There is a lot of research being done on this now.

I started in the online research world with Kristin about ten plus years ago, and I see mobile today the way I saw online about ten years ago. In about 3-5 years we will be seeing about 50 per cent of research being done on mobile device, and not just through survey but again through a lot of passive components that will be able to track people's behaviour and we will find other gamified ways of getting information from them as well. Even Mobile Qual and the ability of people to take a smartphone and take a picture, a video, and upload that into a form where people can start discussing
what that person has posted or what they are doing, with dual location information -- the power of this is going to be unbelievable, and it is just starting.

STEVE DOUGLAS: A suggestion was made to me by the head of online research at Google and one of the online specialists at GfK that one of the things you have to do in mobile and tablet research is obviously pre-screen for the size of the screen, but they both suggested that the evolution that they see coming and they are going to start playing with more and more is take that long survey that Scott mentioned and divide it into four parts with linking questions, or 5 or 10 parts, and get separate samples that are linked with 10 or 15 questions and then try to pull together an estimate of what all respondents would say to all of the different questions.

It becomes very complicated and it requires a lot of modelling and a lot of care but they think that is a technique that we might want to begin to play with if we are in a mobile centric environment and we have requirements for a long data. I would like the reaction of the panel to that concept.

KRISTIN LUCK: There is a term already, "survey stitching", where basically you are taking one long survey and stitching it together with groups of respondents, and we are working with Merritts and a few other companies to experiment and doing some white paper work around that.

In terms of the browser and device detection, all of that is automated on our system and we can "sniff" -- there is a term "sniff" -- and we know exactly what the screen size is, the browser, all that kind of thing.

I'm really interested and I think survey stitching is great. It addresses some of the reluctance in the industry to change anything about our surveys, which I think is unfortunate because I do feel our surveys need to be redesigned, but certainly I think that that stitching principle is interesting and certainly worth experimenting with.

SCOTT McDONALD: Rory, a great job on the paper. I am curious. Most of the independent variables you looked at were what I would characterise as structural variables having to do with formal aspects, placement, things of that nature.

What clients often are asking for when they say what works and what doesn't, apart from taking a look at specific interactive elements, is really the softer measures of creative dimensions which can, of course, vary a lot by type of ad that we are talking about, which PIB does provide data on.

How far have you explored those softer dimensions in your work? Do you think of that as being not scalable on 20,000 ads? What approach can you think of that would take it further toward what a client might be asking about? How do I make creative work in this environment?

RORY O'FLYNN: We did try and include creative elements into our paper. We were trying to cram them in at the end. We found that the data sets we were playing with were not quite appropriate for what it was we were trying to do and how we had our model set up.

We explored some of the concepts from Kantar and some from MRI, and with the timing we had to deliver the paper we didn't get them in, so it is something we are absolutely going to work with our providers on to get that into the analysis at the next stage.

We started this with some of the key pillars where the data was available and wouldn't work in the model, where the creative attributes were a little bit more complex and the data wasn't in the right format or structure that would enable us to include them today, but we have had conversations with MRI and BMRB to get them in in the future.

That is the huge missing part of the analysis and we see this as a first step of a multistage analysis. As we get more data and more ads and then more third party data and more behavioural data from
Armature like interaction rates and interactive elements classified I think we will have a much richer data set again. We tried to get it in but we could not get it in on time.

JAY MATTLIN: I have a question for Sarah on the diary app that you used. In light of the comments I have heard, how many questions were there and were they automatically served every hour, half hour, or was the respondent supposed to click on it whenever he or she had an encounter with news?

SARAH GALE: First of all, the questions we asked were either 6 or 8 depending on what you were doing really, and we make very clear in the instructions that we want people to do it every time they do something. So it is respondent triggered, not automatically triggered, which is why we need to be careful about what we use it for and how we use it.

JAY MATTLIN: Which relates to what you were saying before about them being more likely to remember to do it than if they were doing it on paper.

KATHERINE PAGE: I have a question perhaps also for Sarah and Becky, maybe Max as well, in terms of understanding mobile audiences. Do you have any insights to derive about accessing content on apps versus websites? As we have talked about previously, the websites are still dominating even though it is on the mobile, yet we are hoping people are going to be more engaged and more like print readers on the apps.

Have you been able to derive any insight on that?

MAX KILGER: We are just starting to look at this. Our study has a PC application also so we can collect PC and mobile stuff at the same time.

I don't have an answer right now but that is a really good question. There is so much data it is hard to get through it.

SARAH GALE: We do collect that as part of the mobile network operator stuff. We have not for this presentation because there is so much data, but some of the stuff we have done in our qual work points to the fact that people are much more engaged when they open an app as opposed to going on to a website. Website tends to be part of snacking behaviour, whereas an app is more relaxing. You sit back and take the content in. Certainly that is something we will be looking at in the future.

MARION APPEL: I suggest we go to the final wrapping-up session, so can I thank you all for your contributions.
CONFERENCE WRAP-UP

ANDY BROWN: As you know, the sponsors and the organisers of the PDRF try to make sure you get maximum value from the whole event. What we do is we quite informally take feedback from people that we meet around the event and in between events and try and take on board as much of the advice and needs and wishes of the audience as we can.

What we thought we would do, rather than have a big open forum discussion, is to try to encapsulate some of the thinking that has come from you from our interactions with you and to talk you through some of the areas that we are going to look at over the next few weeks and months about the next PDRF event.

One of the things we have heard several times, and I think it is very important, is that in the same way that we need to be respectful of respondents' time we need to be respectful of delegates' time.

We are very conscious that this is a long event and that it takes you out of the office for a long time. For many people in the room it is a whole week taken out from the office, so one of the things we really are quite keen to do is to shorten the event and most likely bring it down to three days. It will mean, much to Richard's chagrin I know, the removal of the half day afternoon off.

The general feeling is that people like the fact that the event starts on a Sunday, and I think we will try and keep that. It also means that instead of the half day perhaps in the middle of the event, if you do want to bolt on some sightseeing, for instance, you can do it on the front end at the start of the weekend.

RICHARD SILMAN: I reluctantly gave up the full day off when this used to be a 5-day conference, and I am now even more reluctantly giving up the half day off, so I'm thinking maybe I ought to depart the scene because I dread to think what might come next!

Alongside the reduction to three days one of the things we are also going to look at is how we then structure those days so we are not trying to pack 55 papers into three days -- and I want to give a particular thank you to Jay for a fantastic upbeat presentation at the end of all this. Jay, thank you very much.

So we are going to look at how to structure panel session formats to maintain the dialogue, the learning, and the education but also break up that sequencing a little bit.

ANDY BROWN: One of the things we tried this time was the keynote speaker, and I think the general reaction has been quite positive to Philip Napoli's presentation so we would like to try to keep that if we could.

I know a lot of people in this room go to a lot of conferences where you have presentations from ad directors and media directors and people who own companies, and quite often they can be somewhat detached from the event they are speaking at. One of the great things about Phil's paper was it was very much grounded in what we do, so we will look to try to maintain that, and see if we can find another speaker of the same quality and relevance.

RICHARD SILMAN: The next two points are linked.

Again on the subject of change we are very aware that we need to create more flexible delegate packages, but we also want to create some additional incentives for introducing new delegates to come here as well.
ANDY BROWN: We absolutely want to try and create an overall cheaper package for people and to some extent that depends on timing, travel, exchange rates and various other factors, but it is our goal to try to reduce the price of the package.

RICHARD SILMAN: At the same time, as co-sponsors we are also going to make a greater investment in the PR and marketing that needs to go behind this; we need to be doing more of that and far more of it in advance of the PDRF. We also clearly need to get things like hashtags sorted out.

ANDY BROWN: We are some way from 240 delegates squashed in a room in Florence; we are now down to 140/150 delegates, and there is a certain benefit to that because it enables us as a smaller group to be more intimate and have more conversations in an easier fashion, but we need to be aware that our numbers are dwindling, for whatever reason (and there are multiple reasons) and what we will try to do is re-budget for around 140/150 delegates and set the cost base on that. That will be our target.

RICHARD SILMAN: Finally, and part and parcel, we are in discussions with the ARF about how we can find agreement on elements like cross-promotion of the event, how we can work together, and how we can create something in the in-between years when the PDRF is not running.

So there are a number of things we wanted to share with you that we are looking at and are going to be looking at in the coming weeks and months.

Please come up to Andy and me later to give us any thoughts you may have and in the meantime I want to thank you all from both of us for putting in the time and the effort not just to come but for participating in the way that you have.

Now I'm going to hand over to Dawn for her final comments.

DAWN MITCHELL: Thank you both very much.

A few final remarks. The transcripts of all the discussions and comments will be available to you online by the end of the month, and the full data in the summary of audience research which Katherine gave on the first day will also be online shortly thereafter.

Several people have said they would like to see the presentations online as well as the full papers, and this is quite possible for us to do. It may take a few days given the technical content of some of them, but we will go ahead and do it if you would like it, so if anybody has any objection to their presentation being put online for this audience would they please tell Sandy some time this afternoon or evening.

It really remains for me to say thank you to all of the speakers. I have been waiting all week to hear the bell and I haven't heard it because everybody has kept very well to time and been really, really disciplined, and that has allowed us to complete 55 papers by 5 o'clock on Wednesday afternoon. I would like to thank Sandy and all her team who have behind the scenes made this event run so smoothly. They work very hard and it has paid off.

Finally I say thank you to Jan and the AV team from Prague. Jan e-mailed me a couple of weeks ago and said "You are the client who has shown us the world", they came to San Francisco with us, and now they can do it all by themselves absolutely seamlessly. Thank you very much, boys.

Of course they were helped by Barbara, who has not only done all the rehearsals but also made sure that everybody's name was correctly on the screen as they speak, ably supported by Erhard. Erhard is now going into a dark room with all the questionnaires which I hope you have finished. Between now and dinner he is going to mysteriously weight the data so that by the time we reach the coffee stage this evening we will have six winners.
Several people have asked who were the people who were at New Orleans, so Dick Dodson has checked and come up with seven people here in this room who were present at that mythical first Symposium. I guess for them it is absolutely extraordinary to see the world that we were living in then and the sort of research we were trying to do, working terribly hard on paper questionnaires to make them work better and be shorter, and now we have moved into the electronic age.

It is great that they are here and that we are all part of that club. Dick, Steve, Uwe, Peter, Erhard, myself, Gilles, and Barbara -- we are the class of 1981!

Nothing remains except to say have a lovely evening this evening, and we look forward to the next Symposium in 2015. Au revoir, à bientôt, and goodbye!
Best Paper Overall:

**Crossplatform Sales Impact: Cracking the Code**
*Caryn Klein*, *Time Inc.* and *Leslie Wood*, *Nielsen Catalina Solutions*

**Runners-up:**

**Australia: Building a 21st Century Readership Survey**
*Andrew Green*, *Ipsos MediaCT* and *Heather White*, *Newscorp Australia*

**OTSA: Opportunity to See Advertising in Newspapers / Magazines**
*Irena Petric*, *NOM*, *Alke Bassler*, *GfK Intomart* and *Kenneth Gopal*, *ABF Research*

Best Presentation:

**The DNA of the New Magazine Reader**
*Peter Callius*, *Morgan Sandström* and *Eva Springmann* TNS SIFO

**Runners-up:**

**Digital Editions: Modeling Reach and Frequency**
*Julian Baim*, *Martin Frankel*, *James Collins*, *Joseph Agresti*, *Seth Cohen*, *GfK MRI*, *Britta Cleveland*, *Meredith Corp.*, *Marlene Greenfield*, *Hearst Corp.*, *Caryn Klein*, *Time Inc.*, *Scott McDonald*, *Condé Nast*

**Impacts of the Mobile Revolution**
*Kristin Luck*, *Decipher*

Best Technical Paper:

**Mobile Magazine App Audience Analysis**
*Jim Collins*, *GfK MRI* and *Pete Doe*, *The Nielsen Company*

**Runners-up:**

**Digital Editions: Modeling Reach and Frequency**
*Julian Baim*, *Martin Frankel*, *James Collins*, *Joseph Agresti*, *Seth Cohen*, *GfK MRI*, *Britta Cleveland*, *Meredith Corp.*, *Marlene Greenfield*, *Hearst Corp.*, *Caryn Klein*, *Time Inc.*, *Scott McDonald*, *Condé Nast*

**Two Ways to Measure Display Ad Viewability**
*Douglas de Jager*, *spider.io*

Most Useful Personally:

**Passive Measurement of Print Revisited**
*Jay Mattlin* and *James Gagen*, *GfK MRI*

**Runners-up:**

**Measuring a Media Brand Across Platforms**
*Berit Puggaard*, *TNS Gallup* and *Paul Melbye*, *JP/Politikens Hus*

**Magazine Reading in the Attention Economy**
*Scott McDonald*, *Condé Nast*, *Jim Spaeth* and *Alice Sylvester*, *Media Behavior Institute*
Best Newcomer:

Closing the Loop on Digital Reach & Frequency
Fred Leach*, Facebook Inc.

Runners-up:

Investigating Effectiveness: G+J Success Barometer
Frank Vogel and Christoph Danne*, Gruner & Jahr AG & Co. KG

Impact of the Mobile Revolution
Kristin Luck*, Decipher

Beyond ‘How Many?’: Performance Drivers in Digital Issues
Rory O’Flynn* and Tatiana Gabor, Time Inc

Best New Idea:

3 X New – Magazine Research in Norway
Adina Broady Aasebo*, Aller Media, Ingvar Sandvik*, Knut-Arne Futsæter and Tore Østnes, TNS Gallup

Runners-up:

Browsing@Work: Significance for Online ROI Evaluation
Frank Hedler, Marion Appel*, Norbert Wirth, GfK

The Power of Community-Oriented Marketing
David Shiffman*, MediaVest USA

Programme Chairman’s Prize:

OTSA: Opportunity to See Advertising in Newspapers / Magazines
Irena Petric*, NOM, Alke Bassler*, GfK Intomart and Kenneth Gopal, ABF Research