



PDRF 2017 Madrid Conference Report

In his concluding remarks Scott McDonald, Programme Chairman, commented on the “sense of progress” in what had been reported and discussed at PDRF Madrid 2017. It is not possible to mention all of the 43 papers given across the three days, and as usual discussion was lively, but here’s my take on some of the main themes that emerged.

These themes include the tension between measuring brands and planning audiences, proof of why a media-neutral programmatic approach is problematic and innovations in currencies around the world.

Measuring brands, planning audiences

Inevitably the relevance of metrics used to measure publisher brands came up repeatedly in discussion. How relevant are reach and frequency metrics, however impressive the brand footprints concerned, in an environment where the emphasis is on planning audiences?

Peter Callius and Ingvar Sandvik’s paper ‘Is there a Cyborg Future For Print in Today’s Programmatic Big Data Ecosystem’ is a vibrant overview of the current state of affairs in the advertising market in which publishers compete, and was one of PDRF Madrid’s prize-winning papers. They note:

“The irony of today’s advertising community is that we at break neck speed are moving in two different directions. On the one hand, a technocratic route where the key words are digitalization, automatization, programmatic, big data, one to one, real time, optimisation, machine learning, the promise of relevance, activation, direct response etc. On the other hand, the call for a return to the core marketing principles and brand building, and traditional media metrics.”

Peter and Ingvar, along with numerous others at the conference, referenced the work of Les Binet and Peter Field arguing against short-termism. The current balance of UK campaigns with activation rather than brand building objectives stands at a staggering 72%, according to Binet and Field’s 2016 review of the IPA Databank.

Peter and Ingvar’s conclusions with respect to audience measurement were threefold. First, the total brand footprint must be measured, not just print. Second, comparisons need to be possible across media, as publishers do not compete in a silo. Third:

“If media audience research is to fully cater to the new needs of the market the new audience research needs to work as an audience (target group) provider which can create the means for a successful cross media, cross target group media launch”.

To do this, research must be able to provide data on audiences across online and offline editions, and of course feed into DMPs. Ease of access and use is critical to demonstrating relevance. In Norway, for instance, delivering data into external analytic systems is a clear objective of the new audience measurement contract due to begin in 2018.

A relevant development that came out in discussion was the launch of the new Gravity Alliance in France. Nicolas Cour told us that a hundred or so media spanning print, radio and TV will share their data to better compete against Google and Facebook, which capture nearly two-thirds of the online advertising market in France. Advertisers will be able to refine their targeting and plan by socio-demographic data, geolocation, interests and purchasing intentions in order to activate audience segments within the premium inventory offered.

Helen Katz and Caryn Klein's paper 'Audience Buying across Platforms: Guidelines for Addressability in Print, Digital and TV' provides a review of the work done to date by Publicis Media and Time Inc. Time Inc. has executed hundreds of campaigns to targeted segments of print audiences, and has calculated a 17% incremental sales lift on average for the addressable print campaigns.

Another reference point is Ian Gibbs and Lynne Robinson's paper 'Audiences not Platforms – Breaking down Audience Silos'. Ian and Lynne told the story of developing a single-source planning tool built on the UK TouchPoints survey to provide planners with a one-stop shop of comparable metrics for individual online sites, print sections, apps, and third-party distribution channels, such Facebook Instant Articles.

Sample of one

There is a huge job to do in challenging assumptions, as demonstrated by Peter and Ingvar's paper. Denise Turner's paper 'Sample of One' provided an effective case study in challenging the views of young media planners in London as to what constitutes 'normal' media behaviour. By getting them to carry the TouchPoints diary, Denise was able to demonstrate that their media behaviour and the time they spent with newsbrands, TV and radio was much lower than that spent by their cohorts elsewhere in the country.

Viewable, viewed, effective.....

The session on 'The Digital Advertising Ecosystem and its Discontents' was an apt and practical opening to the conference, in the best PDRF tradition.

Tom Drouillard's 'Verified Quality: The New Way to Reclaim Your Ad Dollars' set up the session with his three truths about digital ad fraud, which plagues both fake and legitimate sites and is driven by illegitimate traffic sourcing to meet advertiser commitments. As Tom explained, measuring ad fraud does not minimise ad fraud.

Estimates of the scale of fraud vary considerably, and the extent of the issue for mobile is as yet unclear, however there is no doubt that ad fraud continues to be a major industry issue. As a number of prominent advertisers reconsider and redirect their digital advertising spend, becoming more wary of relying on programmatic and looking to whitelisting, there is an opportunity for publishers to assert their value as premium content providers, operating to a high standard.

This theme was also picked up, albeit from a different angle, in Britta Cleveland and Mickey Galin's paper 'Fake News, Real Consequences', which highlighted the importance of consumer brand perceptions and gave some background on industry initiatives such as The Open Brand Safety framework spearheaded by Moat. However, it was noted in the discussion that there is a certain irony in premium publishers being put under pressure to demonstrate brand safety, given the digital landscape as a whole.

Two separate papers from Roger McLeary and Bernard Cools addressed the importance of thinking about ad formats in terms of which are most likely to be viewable (McLeary) and which are most likely to find acceptance among consumers (Cools). Both papers provide practical assessment of a range of different formats.

In his paper 'Online Ad Format Acceptance: Towards a New Deal', Bernard Cools offered three alternative pathways. One option is to continue as we are, on the basis that while non-skippable ads are unpopular with consumers some studies show forced exposures as more effective than other formats. The risk is consumers will respond longer term by ad-blocking. An alternative route is to focus on native advertising. Finally there is the possibility of working towards what Bernard called a 'New Deal'. In this scenario, interruption is the exception and carefully considered in terms of ensuring "right device, right people, and right time". Whether is possible to achieve a sufficiently widespread level of good practice is the challenge here.

Roger McLeary's paper 'Creating Premium Environments through High Ad Viewability' examined the role of ad format in viewability, while highlighting the lack of consensus on what constitutes viewability in the first place. Some types of format perform relatively similarly according to different standards. Others, such as vertical ads, achieved more various viewability rates according to the standard applied, with the Group M standards being particularly challenging. As a further muddying of the water, not all measurement systems achieve the same viewability results according to their particular techniques. Finally advertisers, and editors, are not always open to the learnings of which ad formats deliver best viewability.

Of course, viewability is only the first hurdle and ads need to be effective. The desirability of combining viewability measures with other ROI measures was picked up in the discussion by Britta Cleveland.

Later that day we heard a paper on 'The Value of Media Environment in Engaging Digital Display Audiences' by David Bassett and Mike Follett of Lumen Research, which spoke to the need to look beyond viewability and demonstrate the value of premium content. This paper went on to win the 'Best Paper' award.

Lumen derive their data on the attention paid to online advertising from eye-tracking devices installed on the pcs of a long-term panel of around 500 households recruited from a shopping loyalty card database. Similar work for mobile viewing is being explored for the future.

Lumen's work confirms that viewability is only the first hurdle:

"Over all the ad impressions we have recorded among our panellists, 66% of them were "viewable". But among these, only 18% were noticed at all.....Overall, that means that only 12% of impressions are actually seen."

In contrast, Lumen's eye tracking work on press indicates that 73% of viewable ads are seen, in this case viewable being taken to mean the relevant double page spread has been opened. The contrasts continue with the average dwell time for digital display being 1.2 seconds, with most views being for under a second, versus 2.2 seconds for press ads.

While the finding that just 12% of impressions are actually seen is sobering, Mike Follett was keen to point out that there is an opportunity for premium publishers. The variation in performance by site is considerable:

“A good environment can make ads 10 times as likely to be seen as a poor one, a differential rarely reflected in media prices”.

The Lumen paper also discusses the ways in which media environment affects attention to digital display. Newsbrands and magazines have a head-start because they are ‘discover’ rather than ‘find’ sites, and as such more likely to garner attention. They conclude:

“Given this variation, it’s clear a media neutral programmatic approach that just aims to deliver impressions to the right person is going to be highly problematic”.

Give me time

There have been many past discussions at PDRF conferences about the value of ‘time spent’ as an engagement metric and Madrid was no different. At first sight, the indications for publisher’s digital platforms are not encouraging. Neil Thurman told us in his paper ‘Newspaper Consumption in the Digital Age’ that while the average reader spends 40 minutes a day with a weekday print newspapers in the UK, the time spent online a day with the same brands is just under 30 seconds per visitor on average. For Neil this emphasised the continuing importance of the print editions.

However this is perhaps a somewhat unbalanced comparison of the huge footprint of digital visitors, some of whom will be very fleeting indeed and unlikely to consider themselves as readers, versus Average Issue Readers of the print title. In his paper ‘An Enhanced Target: The Key Audience’, Geoff Wicken made the case for “isolating the core of digital readers from the transient majority”. Geoff told us that according to TGI Clickstream data:

“The heaviest 20% (of visitors) make roughly four times the number of visits when compared to the average visitor, with four times as many page views and over four times the total amount of time spent on site.”

For publishers to demonstrate the particular value of their online audiences it may be time to look beyond the big numbers and begin a process of categorisation according to relationship with the brand. As ever, the ultimate test of time spent as an engagement metric is the extent to which it serves as a guide to the likelihood to see and respond to ads.

Return on investment

The session on ‘Attributions and Demonstrations of ROI’ included the latest instalment in the impressive body of work by Britta Cleveland and Leslie Wood to demonstrate Return on Investment, in this case looking specifically at the value to advertisers of secondary readers and demonstrating that this was greater than had been assumed in discounting .

Denise Turner described a project to demonstrate the performance of online advertising placed on newsbrand sites. The challenge was to show how digital newsbrands are performing when they are not tracked separately on plans, and the baton was picked up by the Havas Media Group. Advance thinking is essential in order to tease out the metrics.

This session also included Helen Katz and Caryn Klein's paper on audience buying across platforms, previously referenced as demonstrating an average 17% incremental sales lift for the addressable print campaigns.

Truth and integrity

The Great Debate on Day One posited that 'This House believes the truth is rarely pure and never simple' with Peter Callius and Josh Chasin arguing in favour of the motion, and Jim Collins and Denise Turner arguing against. While both sides spoke eloquently, their positions were perhaps closer than might at first appear i.e. the issue is not so much that the truth isn't pure or simple, it's arriving at the truth which is the issue. Although progress is made, the journey is never done.

Our estimates are exactly that, estimates, and some are better estimates of the truth than others. As Josh Chasin put it: "if there was a truth set there would be no need for media research". The key is to identify and illuminate the inevitable biases, and strive to minimise them wherever possible. Ultimately, as Jim Collins said: "the truth is what we agree it is". This agreement is the basis of the 'currency' audience measurement provides to buyers and sellers of advertising. The motion was carried.

The debate struck a chord, and it was striking how a number of the same themes featured strongly in the eloquent Keynote Speech from Didier Truchot, Chairman and CEO of Ipsos, given the next day. Didier laid out three key principles for the industry. The first was integrity. The second was collaboration with bravery and openness. The third was understanding and realism in the face of the complex measurement task, particularly when it came to costs.

Didier saw the next generation of media measurement as needing to be: platform neutral; easy and enjoyable for participants; multi-source and not just survey based; and offering measurements that are as deep as possible in respect of engagement, viewability etc.

Passive versus recall

The conference delivered a perfect example of one area where there have been huge strides in getting closer to an understanding of the truth. Session 5 covered work examining the differences between claimed reading behaviour versus the passively measured behaviour of those same participants. All three papers in this session told broadly the same story. That story was that claimed digital reading behaviour is much lower than passive measures indicate and, even so, not all reported digital reading is correct. The papers were: 'The Quality of Survey based Digital Reading' from Irena Petric and Alke Bassler; 'Comparing Claimed and Passive Publisher Data' from Sandra Collins and Andrey Ponomarev; and 'Winning Combo: Passive Digital Measurement in a NRS' from Nicolas Cour and Gilbert Saint-Joanis.

It is difficult and in some cases impossible for participants to recall the full extent of their reading behaviour, and one-off and infrequent visits are particularly likely not to be claimed. Sandra and Andrey's paper provided evidence of this. However, in a perfect example of how elusive the truth can be, Irena and Alke also reminded us how different the definitions of reading are. Passive measurement records the most fleeting of contacts, some of which participants might understandably not regard as reading.

Sandra and Andrey's paper also confirmed that print readers are 7.5 times more likely than non-print readers to erroneously claim the same brand in digital. This in turn means that duplication of reading a brand in both print and digital will be overstated by recall data.

Nevertheless, as Nicolas and Gilbert demonstrated, even if undeclared visits varied from 25% to 80% by publication group, declared digital reading is still a strong predictor of actual reading behaviour to provide hooks for fusion purposes.

Innovations in currencies from around the world

This session in particular demonstrated the “sense of progress” referred to by Scott McDonald.

The session began with ‘The New Deal of Brand Readership Measurement’ from Nicolas Cour and Stanislas Seveno describing the recent award of French audience survey to Kantar, in partnership with Mediametrie, to provide a “unified measurement of print and digital”. A number of major developments are planned, and the paper was awarded The Programme Chairman’s prize.

Some of the planned developments are ways of being more efficient with existing resources, such as the plan to integrate a ‘premium’ target group boost sample, rather than survey this group separately as previously.

The French plan a number of major extensions to their currency including the provision of data on actual contacts (or GRPs) and audience accumulation. These data will be modelled based on a panel of 4,000 participants who will record their reading behaviour over a period of 9 days by scanning/photographing barcodes. This will capture the specific issue read, first time of reading, repeat reading, time spent reading, reading context etc.

In Belgium new more granular measures are also in hand, and are currently being assessed for publication. Mario Paic and Andrey Pomomarev outlined their modelling work ‘Delivering Issue Audiences’ in respect of Estimated Day Readership (EDR) for dailies and Estimated Issue Readership (EIR) for magazines. Mario and Andrey won the prize for ‘Best Newcomers’.

In Great Britain the new AMP survey is preparing for launch in 2018 and in their paper ‘AMP: 21st Century Print and Digital Measurement’, Katherine Page and Luca Vannini outlined the new readership data based on a brand-first approach and the eagerly awaited data on duplication of reading between print and digital derived from the single-source all-device panel.

In a separate paper later that day, Neil Farrer explained more about the challenges in ‘Developing a Passive Quality Digital Panel’ recruited from AMP participants. The French ‘Winning Combo: Passive Digital Measurement in a NRS’ paper from Nicolas Cour and Gilbert Saint-Joanis is another valuable source of information on the practicalities of setting up a passive measurement system.

Don Williams and Mark Wood gave an update on how the Single-Source Print and Digital (SSPD) survey launched in 2015 in Canada is continuing its development, with a key focus being the trial of a cookie based approach to passive measurement, based on a sub-set of participants to the main SSPD survey, with the end goal of merging passive data with recall data to provide cross-platform estimates.

Several of the Ipsos surveys in the Middle East are also testing passive measurement of the participants’ digital reading as reported by Elie Aoun in his paper ‘Measuring Total Readership in the Middle East’.

Jonathan Brown and Karin Schut took us through the Dutch experience of building a new online currency 'NOBO- The Cookie Monster' as a co-operation between Vinex (the association of Dutch Internet publishers) and SKO (the TV Joint Industry Committee). The vision was to build a single digital audience measurement system to measure online traffic and video, based on a hybrid census and panel methodology, the all-device panel comprising some 5,000 households. The Dutch readership survey NOM will publish the results of a data integration with NOBO data later in 2017.

Greater collaboration between the JICs in the Netherlands has been fostered by them sharing office space and projects such as this. We heard in Madrid that this will be taken to the next level with a joint tender process for all the currencies together in 2018.

Evidence of growing focus on a holistic approach also came from Norway with a paper from Knut Arne Futsæter and Bente Håvimb outlining how newspaper, magazine and digital measurement have been integrated into a single new contract, which starts in 2018.

Peter Langschmidt gave a barnstorming update on the new readership survey in South Africa entitled 'The Reading Revolution, React, Reposition, and Recalibrate'. He went on to win the prize for Best Presentation, which he surely deserved for volume alone.

Peter's update covered a great deal of work to develop the new South African study, PAMS, which is a brand-first interview carried out by CASI. The choice of interview methodology and other design elements have been driven by the requirement to reduce erroneous over-claiming and previously incredible reader-per-copy estimates. PAMS uses a household flooding sample methodology to save costs, and Peter also outlined how an online panel was being built to complement the face-to-face PAMS interviews, taking account as far as possible of the different biases particular to each approach.

More broadly, use of CAWI as an interviewing mode is continuing to increase. The PDRF Worldwide Review of Audience Measurement reports there are now 33 surveys which collect at least a portion of their interviews using CAWI, up from 23 in 2015 and 15 in 2013. Two papers focused on work to adapt the currency surveys in respect of CAWI. The first came from the host country, with Jose Andres Gabardo and Toni Seijo describing the work to adapt the EGM survey for completion online. The second was given by Irena Petric and Mickey Galin, looking at the implications of a growing number of participants completing interviews via mobile phones. The Norwegians have already introduced a 'platform neutral' questionnaire design for their Magazine NRS.

From many to one

In his keynote address Didier Truchot described how media research would be multi-source rather than simply sample based. A number of technical papers outlined recent innovations in respect of the challenges that ensue.

Gilles Santini's paper on Genomic Fusion described a way of improving the way in which donors and recipients are matched for fusion purposes. Gilles won the prize for 'Most Useful' paper.

The context for Pat Pellegrini and Steve Millman's paper was the increasing requirement "to develop datasets that link often imperfect fast-moving data to a higher quality projectable sample data". They described the technique of using a calibration panel to control the fusion of TV/video research sample data with transactional passive data from a convenience panel.

Aptly the final paper of the conference was entitled 'Building a 21st Century Multi-platform Audience Measurement system: Integrating Multiple Datasets into a Single Currency', delivered by Josh Chasin. The short title was 'E Pluribus Unum', from which the title of this section is shamelessly stolen. Josh's paper addressed the issue of data integration where the datasets to be combined are not respondent level and therefore traditional donor-to-recipient fusions are not possible.

Josh described comScore's solution to the challenge to "combine disparate data sets (human panels, census or cookie panels, big data assets, and universe estimates) into a single user facing dataset - one that also reflects corrections for the biases inherent in individual donor datasets". In essence, a synthetic respondent level dataset is created by modelling "a pool of "Representative Household Units" (RHUs), demographically and behaviourally balanced to represent the market". These RHUs become the recipient dataset into which disparate donor datasets are ported."

Conclusion

The final session on combining disparate datasets highlighted what will continue to be a major development area. It also reminded us how important context, benchmarks and credibility are and the ongoing role of quality research in providing those benchmarks. With the heightened awareness that everything is not always as it seems at first sight in the world of digital advertising, the values of 'trust' and 'transparency' have taken on a refreshed saliency. These values are at the heart of the ideas and expertise shared at PDRF.

Madrid 2017 Prize-winners

Best Newcomer: Delivering Issue Audiences. Mario Paic and Andrey Pomomarev, Ipsos MORI

Most Useful: Genomic Fusion. Gilles Santini, VINTCO

Supernatural Award: Is there a Cyborg Future for Print in Today's Programmatic Big Data Ecosystem. Peter Callius and Ingvar Sandvik, Kantar

Best Presentation: The Reading Revolution. React, Reposition, Recalibrate. Peter Langschmidt, Publisher Research Council of South Africa

Best Paper: The Value of Media Environment in Engaging Digital Display Audiences. David Bassett and Mike Follett, Lumen Research

Programme Committee Chairman's Prize: The New Deal of Brand Readership Measurement and Winning Combo: Passive Digital Measurement in a NRS. Nicolas Cour and Gilbert Saint-Joanis, ACPM, and Stanislas Seveno, TNS SOFRES