



Digital Audience Measurement

IAB Measurement Landscape & Positioning

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Comparability, accountability & transparency

Digital media planning and campaign analysis is changing rapidly as the industry evolves, consumer habits change and the planning industry moves to an integrated media channel approach. The world of disparate pieces of unrelated data (e.g. ratings information and ad-serving data) is no longer sufficient or sophisticated enough for the industry to base their investment decisions. Australia has historically been a world leader in digital audience measurement and the IAB through its Measurement Council, comprising members from seventeen different media organisations, intends to continue to drive the industry to look for new solutions to suit the changing media landscape.

Without taking away from the benefits of digital media including incredible targeting options and a myriad of environment and creative options, the IAB aims to make buying and assessing digital media easier, accountable and more transparent. Technical solutions may differ per digital channel (e.g. desktop, smartphone, tablet) but this paper focuses on the key priorities for digital audience measurement regardless of the delivery device. Although this paper concentrates on paid media many of the concepts can also be applied to owned and earned media.

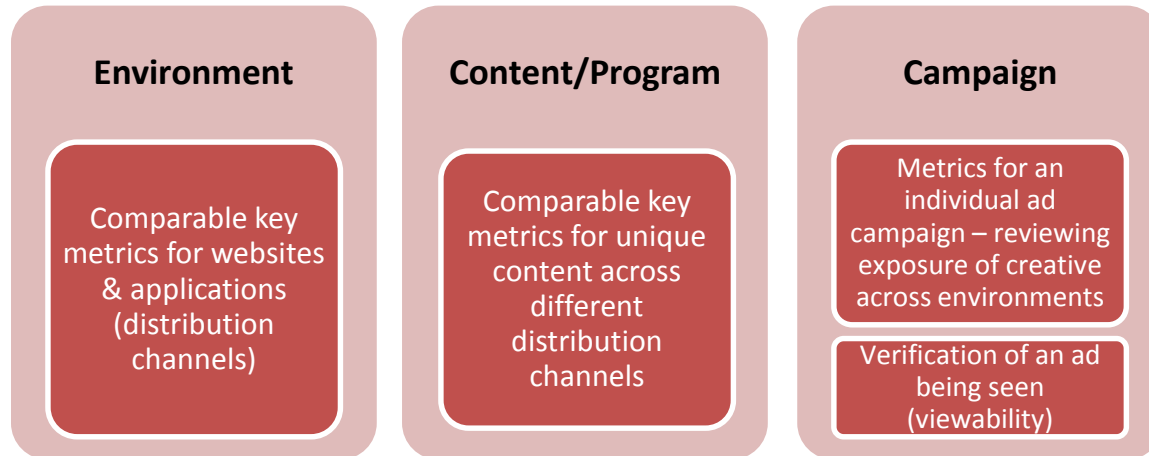
IAB Australia breaks the measurement landscape into two main components:

1. **Exposure** - reach & frequency and targeting – how many people saw my message, across which devices, who were they (e.g. age, gender, etc.) and how many times did they see my message? As with all media channels the chief job of a media environment is to effectively deliver a message to the target audience whether that be content or advertising. The IAB in the US are labelling this as the “push” component of a campaign. This will be reviewed in more detail below.
2. **Effectiveness (ROI)** – reviews the engagement and effectiveness of a medium, message &/or campaign. The methods and metrics for this component are more varied than point 1. The IAB in the US is labelling this as the “pull” component of a campaign. This area is still being reviewed by the IAB Australia Measurement Council and the latest US document for the IAB/3MS titled [“Defining and Measuring Digital Ad Engagement in a Cross-Platform World”](#) is currently under review locally.

This paper will focus on point 1 - exposure.

Exposure

There are three primary components of exposure that need to be reviewed by the digital industry. IAB Australia took an early lead and has primarily been focused on the first area (environment) and continues to see this as a key input into the complete audience measurement picture. However as content models and buying methods have evolved focus must be also placed on components two & three.



1. **Environment** – review of the key metrics for an audience of a website or application. Focus on must be on people based metrics rather than analytics data. For robust planning purposes a market level tool that compares properties with the same methodology & metrics is vital for a healthy digital media advertising industry.

IAB Australia answered requests by the media and advertising industry five years ago to establish a process to help identify a preferred supplier for this information which culminated in the IAB deed with Nielsen Media which is due to expire in Dec 2014. The deed review process kicks off with an industry town hall meeting on March 19th and tender documentation will be released to potential vendors in April 2014.

This part of audience measurement has increasingly become a tool for strategic & initial campaign planning and the IAB is focused on delivering to these objectives.

Lead audience metrics for environment ratings are currently:

- **Unique audience** – people based audience figure
- **Sessions** – number of times an environment has been visited
- **Page views** – number of times a page have been delivered, currently excludes auto-refresh, auto-play and non-standard events such as photo galleries
- **Time** – currently panel based people time metrics are a more accurate measurement of the time people spend on sites than analytics time counts based on a server measurement.

The current default metrics are based on cumulative monthly figures. The need and capability for more time sensitive and granular data will be closely reviewed during the upcoming tender.

After discussions within the Measurement Council including representation from the Media Federation of Australia and key media agencies it is recommended that the **market moves away from using page impressions/views as a lead metric** in comparing environments. IAB Australia is committed to guiding the industry in using meaningful metrics as per our move to retire monthly unique browsers at the beginning of 2013.

The recommendation to move away from a focus on page impressions/views has been driven by changes to site and app content delivery and design making this no longer a meaningful metric to compare across properties. Page impressions will obviously still be a key metric for individual businesses through their individual analytics services and may still be an input into any industry wide ratings tool.

Audience, sessions and time are key metrics that will be appropriate across all digital channels as well as metrics that can interact and be compared with other non digital media channels audience data sets.

The key project to develop this area is via the 2014 audience measurement tender supported by the AANA & MFA.

2. **Content / Programming** - Comparable key metrics for unique content across different distribution channels. This focusses on unique content rather than the distribution environment as per point one. This is the least developed component of audience measurement in Australia however it will become increasingly important as content providers use a variety of external distribution channels to reach their audience and need to provide marketers/investors with a single number for program, stream, event or any particular piece of content. For example tv content in YouTube, Facebook on top of their traditional primary site/app offerings.

Focus on this sort of flexibility in reporting will also allow the industry to provide data on a variety of different ad network type models that are currently in the market.

The ability for vendors to do this will be vetted in the upcoming audience measurement deed.

3. **Campaign** – campaign measurement, also known as audience verification, services provide metrics for an individual ad campaign – reviewing exposure of creative across environments. This is the newest and fastest growing area of the digital audience measurement space. As methods of planning and buying evolve the audience of a campaign is becoming less tied to the audience of an environment creating the need to measure reach /frequency metrics and audience profile based on an ad/campaign exposure. Reliance previously purely on ad serving data provided limited campaign audience information, could be hard to interpret and as a consequence inhibited the amount of brand advertising dollars moving to digital.

The introduction of services such Nielsen's Online Campaign Ratings (OCR) and Comscore's Validated Campaign Essentials (VCE) in the market over the last 12 months have been welcomed by advertisers and agencies giving them richer data that they can use to profile a campaign and align with campaign metrics from tv and other channels.

Current services are focussed on age and gender of the audience of a campaign in Australia however other options including criteria used in behavioural targeting (eg car buying intenders) are also increasingly being made available in the US and in a more limited way in Australia. These additional audience profile reports can be based on either the primary data set of the research provider or enhanced by additional 3rd party data sets.

As the number of reporting profile options increase we are likely to see further divergence in the data from different vendors and from publishers own internal data when available.

Cross digital & tv audience verification services are not yet available in Australia but will be an important driver in the development of cross tv & digital video campaigns.

IAB Position on audience verification (campaign ratings)

- The IAB **supports the availability of enhanced metrics** for digital campaigns that are based on people metrics and demographic audience profiling particularly for use in brand focussed campaigns.
- The current services available in market are still in their early days of development both at a total product level and in terms of localisation. Although these tools can be used to gain insight for individual campaigns and help optimise planning decisions they are **not robust enough yet for use in trading**.
- The IAB encourages all media sellers with **rich consumer data sets** to discuss options with research vendors to see if any **integration** is possible and then to discuss the likely changes to reporting if this path is pursued.

- The **IAB Measurement Council will be releasing guidelines on usage** of the services in April 2014.
- When the products and market are ready for the IAB to review the **option for trading** on this type of data it is expected that it will be **limited to the same demographic options that are currently used by tv buyers** – age, gender and geography. Trading on additional segments that can vary from organisation to organisation will be used to help inform planning & buying decisions but should not be used in trading negotiations.
- Audience verification will **not be integrated into** the main audience measurement **tender in 2014**. However the technical review process for the tender may consider the role of audience verification in relation to audience ratings data.

Ad viewability information is built into audience verification services along with other measurement tracking tools (e.g. ad serving) and viewability tracking can help enhance the rigour around reporting who was actually exposed to a piece of creative. This added layer of accountability also help increase the accuracy of any attribution models that are used to look at the effectiveness of a campaign.

IAB Australia is committed to working with the market to identify the best solutions and way of rolling out this new metric. However currently there are still major difference between vendor numbers and technological challenges. Recent tests in the US carried out by the Media Ratings Council show variances in reporting data between vendors that can exceed 50% as well as a significant portion of inventory that was not measurable due to technical issues.

Another round of testing is currently underway in the US testing a range of hypotheses on why there are such major discrepancies between vendors. It is expected this data will be available early April. The Media Ratings Council will be issuing refined specifications for viewability by the end of March and will have these available for public comment for 30 days.

A local test of vendor technology will be run in April/May 2014 with the support of the IAB and MFA to establish clear guidelines on the use of viewable metrics for standard and video display units. At this stage there is no consistency or agreement within the market on viewability metrics. The IAB and MFA will continue to work together on reviewing the market readiness of this metric.

Currently the near final specifications for viewability address standard display units and there is further work to be completed for video and mobile inventory.

The Future of Digital Audience Measurement

The IAB believes there will be a need for all three types of reporting (environment, content & campaign) however the focus and investment will definitely shift from the environment to campaign during 2014. To provide the most accurate campaign profile reporting we need robust, representative data on the audience to an environment that may or may not be enhanced with data from other data providers and must adhere to the new Australian Privacy Principles.

Comparability, accountability & transparency

To reach the objectives above and to show the market that we are a mature and accountable medium, the IAB is focused on the following:

- **Metrics that matter** – help the agencies/marketers focus on what is important to THEIR business – retiring metrics that no longer work as a comparable metric will assist this. For example - page impressions as a lead metric no long holds.
- **Platform agnostic** – although there may be different technical solutions for different devices (desktop, mobile, tablet) or content types (e.g. video) the approach to measurement should the same regardless.
- **Cross media metrics** - paid media channels needs to work together by creating metrics and systems that can be used by marketers to assess their whole paid media spend we can effectively highlight the benefits of reaching their target audience through paid media channels. As marketing budgets shift further to CRM and other digital marketing options paid media will have to increasingly work together to maintain share of marketing budgets.
- **Ads that are seen by people** – the embracement of viewability & audience verification will address the issue of incorrect attribution and will assist flushing out inventory that actually negatively impacts effectiveness metrics for digital media. Media sellers that invest and develop quality audiences should be rewarded appropriately.

This document was developed by IAB Australia and IAB Australia's Measurement Council.

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About IAB Australian's Measurement Council:

The IAB Measurement Council (MC) is the peak Australian industry group addressing the challenges of online media measurement. Comprising the leading measurement and research analysts from many of the largest digital media organisations in Australia, including technical and executive representatives of the Media Federation of Australia (MFA), the MC is tasked with developing the industry audience and campaign measurement methodology most appropriate to support the continued growth of online advertising in Australia.

Member companies of the Measurement Council include:

ABC	News Australia
Carsales	REA Group
Facebook	SBS
Fairfax Media	Seek
Google	Telstra Media
MCN	TEN
Media Federation of Australia	The Guardian
Mediacom	Yahoo7!
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