I’d like to tell you a story. It is a story about how the OOH advertising industry, both buyers and sellers, have come together to define and develop the first “eyes on” audience measurement system in the United States.

Before I begin, those of you who are not familiar with the TAB need to know that we are an industry organization comprised of advertisers, ad agencies and OOH media companies. Our governing by laws requires that advertisers and agencies have the majority vote. That is essential when any industry attempts to build a credible ratings currency.

Our story starts several years ago when The TAB held the first of a series of Leaders Summits.

It was the beginning of an industry dialogue. A dialogue about industry needs. Better audience measurement was at the top of our member’s list of priorities.
While our story will not be completed until next year, I would like to tell you about the first four chapters filled with learning and insight.

- Chapter 1: Needs Assessment
- Chapter 2: Best Practices/RFP
- Chapter 3: Design/Implementation
- Chapter 4: Transition/Education

Our first chapter begins with a statement of industry needs.

From the media perspective, their objective came through loud and clear.

OOH media advertising currently represents approximately 4% of total ad spend.

The absence of a strong measurement system has been a barrier of entry for many advertisers.
In countries with solid measurement, such as the France (12%), the UK (10%), and Spain (8%), OOH media possess a significantly larger share of ad spend. Historically, the introduction of credible OOH audience measurement systems have contributed to revenue growth.

Wachovia Capital Investments has forecast that the new TAB Eyes On measurement system will help bring another $7 billion in revenues to the OOH industry and that would double current industry revenues.

Today’s Forum is targeted to national advertisers. The more fundamental issue is how Eyes On will better meet the needs of national advertisers and their agencies.

DECs (Daily Effective Circulation) have been the currency for buying and selling OOH media for over 75 years. While they are accurate measures of OOH circulation, they are not a valued media currency.
There are two primary reasons:

- DECs are reported for total persons 5+ or 18+ and not for the target demographics used to plan and buy other media, and
- As the audiences for other media continue to decline, OOH circulation measures are simply too large to be compared with other media.

As a result, planners and buyers significantly discount DECs. Unfortunately these discounts are not based on any real empirical data... merely best professional guesses.

The use of circulation measures and the absence of target demographics have also placed OOH outside of the budget setting, channel planning, and ROI analyses of today’s accountability oriented national advertisers and their agencies. For any medium, that is not a very good place to be!

Our needs assessment identified 3 critical features that form the foundation of the TAB’s Eyes On measurement system:

1. The reporting of demographic audiences at a board by board (vs. package) level.
2. The consistent availability of demographic information in all 200+ markets.

3. The movement from the reporting of circulation audiences to Eyes On commercial ratings; the first medium in the United States to make such as move.

During the early stages of our process, some media companies asked why OOH should be held to more stringent standard than other media. The answer from TAB’s advertiser and agency members was loud and clear, “Don’t expect more investment in the OOH medium unless you invest in the accountability measures we need.”

Our second chapter began with an extensive international examination of the best practices in OOH measurement. In addition to contacting individual countries, we relied heavily on the international research community and media measurement symposia held by the ARF and ESOMAR.

During this process, our status in the international OOH research community began to evolve. The American OOH community transformed from being passive followers to a recognized leaders in worldwide OOH research.
Two years ago, the TAB issued RFPs for the various components of an integrated Eyes On measurement system. Over 20 companies from around the world participated in that process.

The knowledge grown from that process has not only created a new way of thinking about OOH measurement, but has also produced learning that can be applied to other media measure. But let’s start with what we learned about OOH measurement.

Three fundamental insights were gained from our international investigation.

1. OOH measurement requires more than an understanding of media research. It requires knowledge of travel, and the required expertise in measuring travel is not part of most of our media researcher’s skill set.

2. OOH media measurement requires an integrated research program. Survey research (alone) is simply cannot measure OOH media exposure. This is large due to the geographic dispersion and granularity of OOH media around the country; I’ll tell you more about that in a few minutes.

3. Eyes On OOH research requires a diverse set of research expertise. We found no single research supplier with the full range of expertise required to deliver the complete package.
Our learning led to the establishment of new rules which guided our ultimate research design and implementation of our research program. They are worth noting in that they have growing value not only for OOH, but potentially for all media.

- The need to move from pure survey-centric to an integrated research program is the result of the survey’s inability to accurately report discrete media units in a fragmented and disperse environment.
- That shifts the center of the research design away from the providers of survey research to the modelers who possess the tools to build knowledge from various independent sources.
- The measurement focus had to move from the reporting of vehicle audiences (e.g. TV programs, magazines, radio day parts) to the reporting of commercial audiences.
- In order to deliver this vision, it was critical that the data in the integrated system be under the control and “ownership” of the industry (rather than an individual supplier). Note: this is based on the need for overall research quality and flexibility rather than commercial incentives.
Finally, the ultimate test of the value of the measurement system cannot be derived from purely validation studies; which are increasing difficult to implement). The value is derived from the functional demonstration that the system leads to better decisions for all constituents.

While these New Rules are very important to the research community, let’s get back to Eyes On by establishing a basic definition of the most critical piece of our measurement system.

Eyes On Audiences are the portion of the OTS audience to have “contact” or “notice” the ad on an OOH unit.

Eyes On is not a measure of engagement or the emotional response to the ad.

It is essentially a measure of the “true” audience delivered by an average (creative impact) ad by a specific OOH media format in a specifically defined environment.

We believe that this is the audience that all visual media should be measuring and wonder when other visual media will follow.
Having taken sufficient time to understand our needs and review our options, the third chapter lays out the subsequent design of our Eyes On measurement system and the implementation program which is now underway.

Our integrated measurement system is supported by four essential pillars:

1. Traffic counts, Census travel studies and other site centric data provide the site and market specific information required to report board by board estimates.

2. Our VAI research program will generate the “visibility adjustments” required to convert circulation or opportunity-to-see audiences to commercial audiences likely-to-see the ad.

3. Original travel surveys commissioned by the TAB not only provide demographic information, but also information about trip purposes, modes of transportation and audience reach and frequency.
4. The analytics and modeling component transforms these discrete and rich information into Eyes ON OOH media measures.

A diverse set of world-class suppliers were select for the project. Each contributed a unique core-competency.

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<thead>
<tr>
<th>Supplier</th>
<th>Core Contribution</th>
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<tbody>
<tr>
<td>Transearch (Peoplecount)</td>
<td>Traffic engineering and pedestrian modeling.</td>
</tr>
<tr>
<td>Mediamark Research &amp; Intelligence (MRI)</td>
<td>Research instrumentation. Survey design and implementation.</td>
</tr>
<tr>
<td>Gfk Custom</td>
<td>VAI: Pilot of video simulation.</td>
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<tr>
<td>Micromerensions</td>
<td>VAI: Production of video simulations and eye tracking expertise.</td>
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<tr>
<td>Perception Research Services (PRS)</td>
<td>VAI: Administration of eye tracking field tests and coding.</td>
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<tr>
<td>Marketing Accountability Partnership (MAP)</td>
<td>VAI: Model development and data diagnostics.</td>
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<td>Telmar</td>
<td>Database architecture, modeling, data delivery.</td>
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The need to produce board by board ratings requires in-market and site specific information. TAB collects this information from approximately 2500 DOTs around the country.

We also utilize census surveys that provide trip and traffic flow information from and to neighborhoods in all markets. These in-market data provide the foundation for the demographic profiles of people “passing” billboards and other OOH inventory.

We will supplement these data with 50,000 original travel surveys conducted in 15 markets. A portion of these surveys will be state-of-the-art computer assisted in-person interviews (CAPI). The CAPI interviews will be supplemented with 45,000 mail surveys that capture information about trips, mode of transportation and purpose (e.g. shopping). Limited information about multi-media behavior was also included for future linkage with media planning systems. Both of these methods have demonstrated the ability to achieve high response rates (relative to other media survey techniques). Note: Disclosure of response
rates and other research related issues will be shared with the advertising industry prior to the release of the full study.

The VAI component (Visibility Adjustment Index) is derived from video simulations of a variety of OOH media formats in a variety of environment situations (e.g. road type and side of road). Recognizing that vehicular and pedestrian exposures to OOH are different experiences, each is being studied separately. Our use of video simulation techniques is “breakthrough”. Earlier studies have primarily relied on still photography. The use of video and a dynamic approach to the modeling of VAI adjustments allow for the inclusion of digital billboards and other new media formats as they develop and as we learn.

While the primary data used in our system has been available for many years, the computer capacity and analytic skill set required to transform these discrete data elements are relatively new to the American media research community.
Our architecture has been specifically designed so that it can easily accommodate new data from different sources as warranted.

Let’s conclude this chapter with a summary of the building blocks of the Eyes On measurement system.

In-market traffic counts or circulation, demographics from travel surveys and visibility adjustments are the building blocks that combine to deliver eyes On demographic ratings, GRPs, and reach and frequency. These estimates will become the new currency for buyers and sellers of OOH media. They will also be integrated into the planning tools used by both OOH specialists and multi-channel planners. The ultimate utility of the new currency will be achieved when these currency measures can be integrated into the budget setting and ROI analyses used by national advertisers.

Our 4th chapter shifts direction to the world of business practices

The successful transition from one media currency to another involves more than merely the introduction of better measures.
At TAB’s last Leaders Summit our members articulated three needs critical to facilitate their use of the new Eyes On ratings.

The first was the development of an educational program customized to each core constituency: sellers, buyers, planners, and advertisers. Next, the integration of Eyes On data into the information systems and tools currently used by each group, and lastly, building of the consensus required to foster industry wide use of Eyes On as the currency for conducting OOH media transactions.

Over the coming months, our industry wide outreach will cover all aspects of the new system, including

1. The quality of the Eyes On travel and media research program.
2. The value of the integrated research approach and its ability to provided board by board ratings, and .
3. The definitions of and applications for our Eyes On commercial ratings.
For national advertisers the move from DECs to Eyes On will mean the transition to a new metric that will put OOH into your channel planning, budget setting and ROI analyses.

Eyes On will add a missing piece to the quantifiable assessment of OOH in your integrated marketing programs.

Two years ago, while The TAB was in the RFP stage, we promised to deliver our Eyes on system to 3-5 years.

The TAB Board of Directors and our membership Told us that the industry could not afford to wait 5 years for all markets to be delivered. I am pleased to tell you that with the support of our membership and the hard work of our suppliers, we will be delivering Eyes On ratings in all 200 markets around this time next year.
Between now and then, we will continue to prepare the marketplace.

Tomorrow we will hold our next TAB Leadership Forum. At that session, data formats will be shared and discussed along with an initial outline of our training program. The release of preliminary data will begin at the TAB conference (4/08). Workshops at that session will include the basics findings from our VAI study, and how to use the new Eyes on Media metrics. Full delivery of the measurement system is targeted for the 4th quarter of next year.

If you would like more information on any aspect of our new system, please contact us at TAB, or go to our new website, exclusively dedicated to the new system:

In conclusion I would like to stress that this is a fantastic journey of transformation that was defined and built by the industry for our industry. Your support has been and will continue to be vital for our success and for that the TAB and I would like to thank you.