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Outdoor Issues RFP For Industry-Owned Ratings, Nielsen A Frontrunner

by Joe Mandese, Thursday, Oct 13, 2005 9:02 AM EST



AT A TIME WHEN MAJOR electronic media such as radio and TV are still using archaic methods such as paper diaries to measure their audiences, a far older medium--outdoor--is poised to leap into the 21st century with new, state-of-the-art measurement technologies, and it is TV industry stalwart Nielsen Media Research that has emerged as the most likely candidate to do it.

But unlike other media where the ratings suppliers own the data and control the methods used to generate them, the outdoor industry plans to introduce what would be the first industry-controlled ratings system of a major medium, something Madison Avenue is just now weighing for other media.

The Traffic Audit Bureau--a trade association that acts as the outdoor media industry's official bean-counter, conducting so-called traffic audits that serve as the basis of outdoor media circulation estimates--has quietly issued a request for proposal to a variety of potential research suppliers to develop a new audience ratings system for the outdoor industry.

The TAB would continue to conduct its circulation audits, known as "daily effective circulation" or DEC's, but would use the new ratings data to provide demographic information about what type of people were exposed to an outdoor ad, when, and for how long.

The demographic data, when coupled with the TAB's circulation data, would provide total audience estimates analogous to all of the major media, putting outdoor on a level media planning field for the first time.

The bifurcated approach is not unusual. Audience estimates for other major media are based on similar two-step processes. Newspapers and

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magazines, for example, derive circulation data from auditors, which are combined with so-called readership data from Scarborough and Mediamark Research Inc., respectively, to produce total readership estimates.

Online media is similar, deriving the equivalent of circulation data from site or server user log data, which is combined with panel-based research from Nielsen//NetRatings, comScore, and others to generate the equivalent of ratings data. Recently, NetRatings even developed a system for factoring the amount of duplication that occurs with server data as a result of individual users deleting tracking codes known as "cookies."

In fact, the only major media that do not use a two-step process are radio, and parts of the TV business. Radio still relies on paper diaries, while some TV markets use meters exclusively. Other TV markets still depend on either diaries exclusively, or a combination of diaries and meters.

Like the outdoor industry proposal or the Internet, some TV research suppliers have been trying to develop a census-based system drawing actual viewer data from digital set-top devices, which would be combined either with a separate demographic survey in the case of TNS' plan, or through modeling and possibly a separate survey in erinMedia's plan.

erinMedia, which has taken control of a promising outdoor and radio audience measurement firm called Navigauge, is one of the players expected to compete for the outdoor industry's ratings system. Navigauge uses a system that incorporates global positioning satellite (GPS) technology into cars so that advertisers and agencies know exactly when, where, and how fast people were going when they were exposed to outdoor advertising. The problem with the Navigauge technology is that it does not account for pedestrian traffic.

Arbitron, which has been developing a portable people meter system carried by individuals, also plans to compete, confirmed a company spokesman--but its proposal would be more of a longer-term one that relates to a broader rollout of the PPM technology, not one devoted exclusively to outdoor audience measurement.

Arbitron was a leading contender alongside Nielsen to develop a GPS-based measurement system for outdoor, but has since abandoned that technology, while Nielsen has raced ahead. Nielsen's outdoor unit was recently awarded a contract to use that system to provide outdoor ratings in South Africa, and on Wednesday released the first findings of GPS-based outdoor ratings in the United States from a system it has been testing in Chicago. While Nielsen didn't actually make any of that data available to the press, it hailed the achievement as a milestone, citing testimonials from several industry leaders, including Starcom MediaVest Group's Kate Sirkin and the TAB's Joe Philport.

The Nielsen Outdoor technology, which was developed by RDP Associates, is known as the Npod, a cell phone-sized device that panelist carry with them throughout the day, much as they would Arbitron's PPM devices.

Because it has made such advances, Nielsen Outdoor is seen as a favorite to win the TAB's contract, although it is possible that several different vendors may supply components of research to the TAB, which would be integrated with other data gathered and compiled with the TAB to produce a unified rating estimate for outdoor audience exposure.

Most significantly, the data would be owned by--and the research methods

controlled by--the outdoor industry, its advertisers and agencies, as opposed to ratings systems for TV, radio, magazines, newspapers and online, which are owned and controlled by research suppliers.

Recently, the ad industry began discussing the possibility of forming a joint industry committee, or JIC, to do the same for other media, including television--but the effort was abandoned when Nielsen threatened an antitrust suit. Last month, the Advertising Research Foundation unveiled the Audience Measurement Initiative (AMI), which will function in many ways like a JIC, but will not own or control the research developed by suppliers.

Joe Mandese is Editor of MediaPost.

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