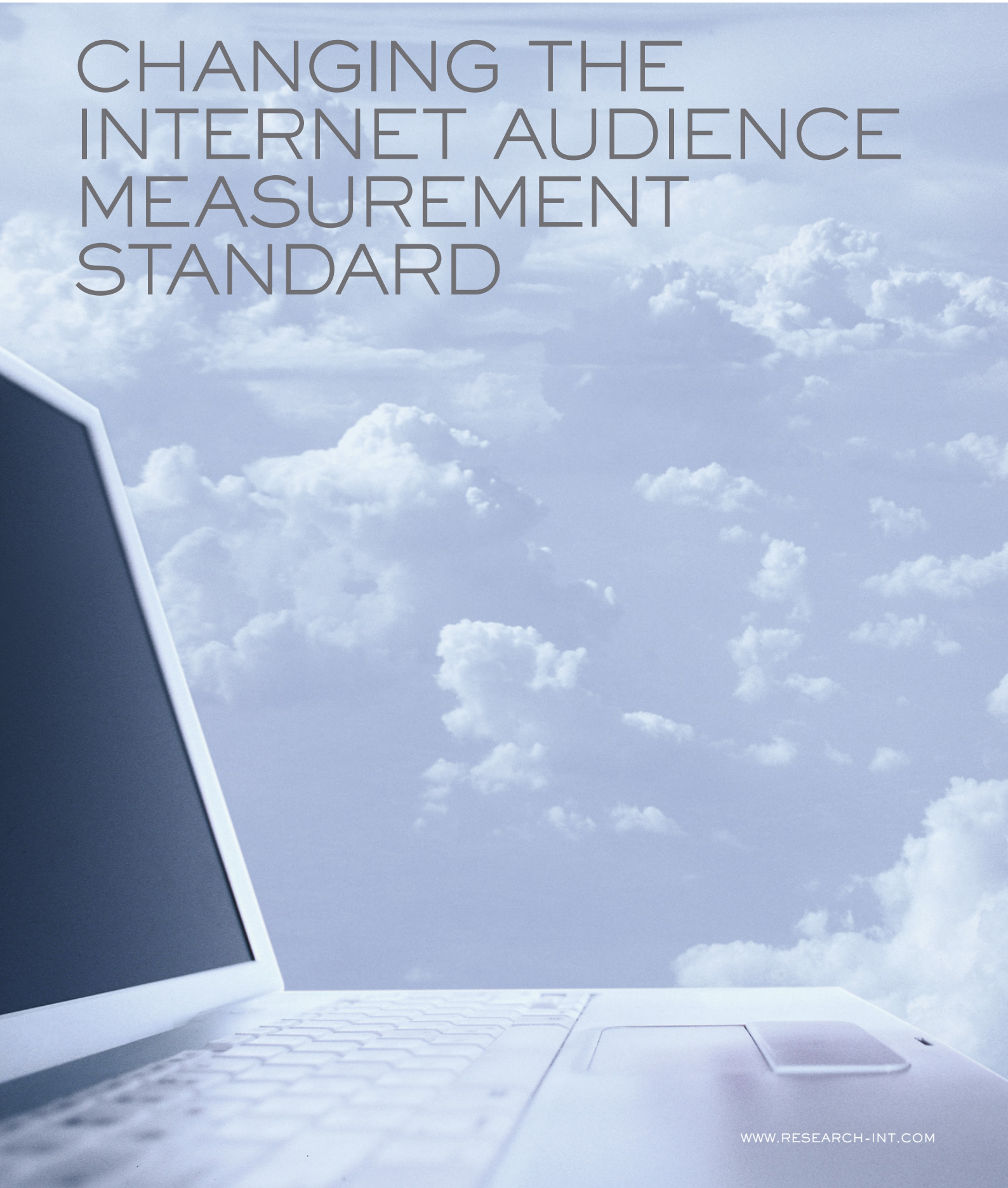
RESEARCH INTERNATIONAL

CHANGING THE INTERNET AUDIENCE MEASUREMENT STANDARD



WWW.RESEARCH-INT.COM

CHANGING THE INTERNET AUDIENCE MEASUREMENT STANDARD

BY PETER CALLIUS, ANDERS LITHNER, STEFAN SVANFELDT

This paper describes a completely new way of measuring Internet audience behavior. By combining a low tech TGI Survey with a high tech user centric panel measurement and a site centric electronic measurement system it allows us to see the surf patterns of a panel of which thousands of target group variables are already known and furthermore the ability to optimize advertisement exposure electronically.

INTRODUCTION

The great thing about the Internet is that almost everything is measurable. Unfortunately the dilemma is precisely that – that everything is measurable. This has at times been in the way of the development of new and more flexible measurement systems.

Media fragmentation, advertising avoidance, technology development and the need for an understanding of ROI are four of the most important driving forces in the media world today. More heterogenic consumers are also pressing the need for more target group data to target and describe consumers.

Media fragmentation forces advertisers to use more media vehicles than before to reach the same result. Advertising avoidance forces advertisers to meet the customers when and where the customer at any moment accepts to receive the advertising. Technology development leads to the rise of digital media and changes in the way people consume media. The pressure on marketing managers to produce ROI figures also brings out the necessity for mixed media planning.

In Sweden, as in many countries, competing ways of measuring Internet audience behaviour, based on different techniques and presenting very different results, have confused the online advertisement market since the birth of Internet. In fact the closest thing to an industry standard in recent years has been the electronic traffic measurements of the total number of unique web browsers visiting any given website during a given week or month. Though such figures may have been better than nothing it is long since recognized that there are at least two aspects limiting their usefulness: 1) they account for the number of computers visiting a website rather than the number of individuals; and 2) they tell us nothing about who is consuming what, since they lack target group information.

The solution to the questions arising from the driving forces noted above is that the media industry needs to address these issues by creating mixed media databases that include a vast amount of target group data and also includes 'new media' such as the Internet.

In Sweden there already exists a working single source survey (50,000 respondents) covering all the major media (television, radio, direct mail, print, cinema). Until recently, however, the Internet was not adequately included in the model. This paper will cover the work and show the results on the experimental work that has been done to include Internet in the mixed media model and also turn it into a commercially acceptable product, called ORVESTO Internet.

INTERNET AS AN ADVERTISEMENT VEHICLE

Before turning to a more detailed description of the concept, let us discuss some contextual factors surrounding the measurement.

New technology development such as the broadband explosion has resulted in a world with consumers who are always 'connected'. New search technologies have made the web universe easier to navigate and more manageable than before and which also offer exciting new possibilities that are not present

in any other media.

This has lead to a world where the Internet has become a part of everyday life and most people are more or less connected 24/7. Seventy-eight percent of the Swedish population is using the Internet at least on a weekly basis and the biggest divide is really being between the 50% that use the Internet at work compared to the 50% that do not. More than 40% regularly do their banking and read newspapers on the net. Media convergence will definitely further fuel this development.

A new brand-building tool

The growing realisation amongst main stream advertisers that the Internet is not just a direct response channel but also can be a strong brand builder has also changed the way in which Internet advertising is planned. Thus the Internet nowadays seems to be an integrated part of any large advertiser's media strategy and the Internet is now a serious contender for the major media advertising budgets.

Currently more than 10% of the total advertising spend is placed on the Internet, accordingly the focus is now on delivering results. As the Internet grows in importance as a brand building tool the need for more detailed target group information and exact demographic targeting increases, since these detailed targets are those the advertiser wants to influence from a brand building perspective.

In a perfect world the advertiser's own carefully chosen market segmentation can be perfectly reflected in the target group definition. This is obviously not possible in any site centric direct response tool or in any panel that is too small to handle a deep well of TGI data.

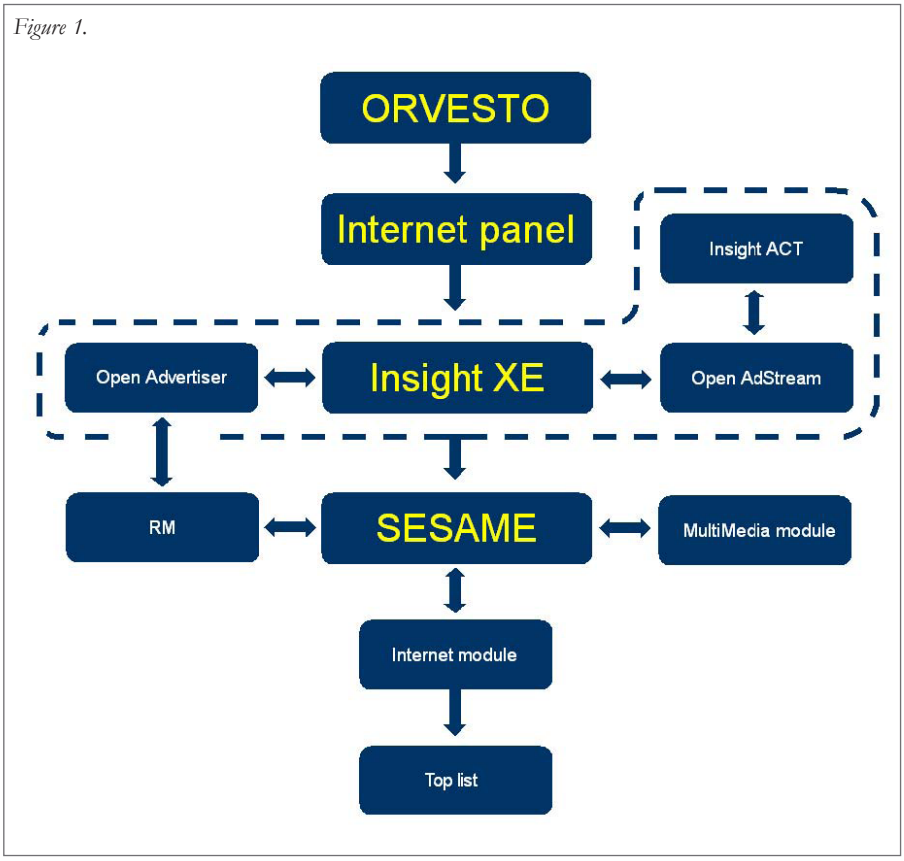
My universe is not your universe

This also takes us to the question of the web universe. To an advertiser there is an enormous difference between a web-defined universe and a total population universe. To compare the Internet to other media, advertisers need a universe that is defined in the same way as for other media – consequently it needs to reflect the total population and not only the Internet population.

Direct response focus

Unfortunately there also seems to be a large divide between traditional media planners and new media planners and consequently also between advocates from 'new media' and representatives from the traditional media houses that have extended their brands into the online world.

Figure 1.



Direct Response advocates are doing their fair share of agency bashing when they claim that traditional agencies do not understand the complexity and uniqueness of the Internet and new disciplines such as search engine optimisation and as a result are not getting their fair share of advertising from the traditional agencies. They further claim that agencies are adopting a TV centric approach viewing the Internet as a mass medium and not as a highly targeted precision tool.

However, as is the case for most media, direct response cannot be a major part of the revenues for a media because it just is not fair to the medium. The media has no control over the pricing of the advertised product, the advertising agency's creative work or even the fact that the advertiser might be trying to sell a crappy product.

With a direct response focus, the brand building part of the advertising would be left unaccounted for and only the "exposure" that accounted for the response will be taken into account and not the on and off line advertisement that eventually lead to the desired response.

It is also true that if you look solely at the Internet from a direct response point of view, there is really no use for an Internet media currency at all, since response based pricing and optimisation is being dealt with on a case by case basis.

A media house divided

Many of the major Internet players have their foundation based in traditional off line media. The situation right now is that they are building a media house divided since in many cases they do not have the possibility to calculate duplication nor to take credit for the synergies that occur between the on and offline editions of the media. From a branding perspective it also makes the

branding task almost impossible when the duplication between on and offline editions are not known on a target group level.

It has also lead to a situation where on and offline sales representatives are working in completely different ways. From a publisher's point of view this is clearly a waste of resources and from a advertiser's point of view it is as stupid since they cannot evaluate the full impact of an on and off line campaign even when it is placed in the same media house.

The best of both worlds – the solution

Unfortunately some seem to look at reach and frequency models, with the comparability

that goes with them, as standing against the development of even more advanced site centric direct response optimisation tools.

Nothing could be more wrong.

The way we see it, Internet as a brand building media has to be measured on a large nationally representative single source mixed media panel that allows the medium to be an integrated and important part of mixed media communication.

However, in the next step the panel research needs to be combined and fully integrated with site centric optimisation measurement systems. In that way we can fully exploit the true value of the Internet as a medium that offers both a way to attain brand response and a way of increasing consumer response.

That is precisely what we have tried to do when designing ORVESTO Internet, as the measurement system is called in Sweden.

ORVESTO INTERNET – ITS STRUCTURE AND COMPONENTS

Described schematically (see figure 1 below), the postal survey ORVESTO Consumer with a sample of 50,000 respondents is used to recruit an Internet panel. Each of the panel members is then asked to accept a simple cookie file from the RealMedia traffic measurement InsightXE (in turn linked with site centric banner systems) on each of the computers that he or she uses to access the Internet.

Since the respondents of the postal ORVESTO Consumer keep their identification number all along, from the postal survey, to the panel and all the way into the little cookie file placed on their computers, we are able to identify the panel members in the site centric traffic measurement and attach all the information from the postal survey to the electronically monitored traffic patterns of the panel. This way Internet audience behaviour can be analyzed single source with other media consumption and on the background of rich target group information. All this is made possible by the Sesame analysis platform.

InsightXE, being a total traffic measurement and not a measurement built on a statistical sample, reports the number of unique web browsers visiting any site during a certain period, as well as the number of visits, page views and a whole range of other key values. This data is of great importance to the individual websites, since it gives a lot of information, in real time, on matters such as what sections are the most visited, how the visitor navigates, how the site performs electronically and so forth.

The basic figures from the traffic measurement are also made available in the Sesame software, where they are presented pretty much as the press circulation figures which are published alongside the reach figures of print media titles.

The traffic measurement figures are also used to produce a frequently published top list and since the traffic measurement of websites at the media title level is closely linked with corresponding systems from RealMedia to measure banner performance, the plan is to 1) give TGI data on banner level; and 2) to use the banner system to collect Internet advertising spend data.

ORVESTO Consumer – he base study

As mentioned earlier, one of the two pillars on which the measurement rests is the postal survey ORVESTO Consumer. The survey is carried out three times a year and has served for many years as the print media industry standard in Sweden. Alongside the print media reach questions the questionnaire also contains a vast range of TGI data as well as questions on cinema, outdoor and direct mail consumption. As a result of a second interview on the same sample the database made available to the market also contains reach and frequency data for radio and television.

Some 5,000 respondents complete the ORVESTO Consumer questionnaire each year and the data is delivered in the Sesame planning software – a platform used by just about all key players on the Swedish media market (see below). That means that unlike many other countries a single source cross media measurement already exists in Sweden.

Since the release of the Sesame Multi Media Module in 2004 ORVESTO is becoming more and more used for cross media analysis, but until today the Internet figures have been based on recency questions in the postal questionnaire. For obvious reasons that is not the most accurate way to measure Internet use. It works for the top level reach of large websites with strong brands and no blurry alliances with content providers, but it gets too rough on sub-site level and in all cases where the website brand and the website URL differs from each other. That is why the postal recall data is now replaced by electronic panel measurement.

The user-centric Internet panel

The panel used for the Internet measurement described in this paper is recruited from those ORVESTO respondents that do not actively disagree (by checking such a box in the questionnaire) to participate in further surveys from Research International (or actually from SIFO, which due to its uncontested public recognition as the 'official' provider of opinion, media and market statistics is the brand used by RI Sweden when communicating with survey participants). Today some 17,000 panel members have been recruited this way and approximately 8,000 of them have activated their computers in the measurement.

The e-mail address of the panel members is taken straight off the questionnaire if the respondent has filled it in; otherwise it is gathered with the help of an additional telephone interview to everyone that uses the Internet and does not actively disagree. As soon as a panel member is recruited all communication is taken care of by e-mail unless the respondent chooses to call the support phone number.

It should be said that the representation of the panel is remarkably good. When we compare the un-weighted panel with the respondents in ORVESTO Consumer that claim they use the Internet regularly, we find no significant biases at all when it comes to gender, age, region, income, education or even Internet use. However, when compared in terms of softer properties such as interests and lifestyle indicators we find small biases that call for weighting procedures that will be described later on.

The electronic measurement stands and falls, however, with the representation of the universe which is not just of the sample of individual panel members, but also of the sample of measured computers.

To make sure we measure all computers used by the panel members, but only the computers used by panel members – when they themselves are using them – we need to have a good picture of their Internet environment. Knowing this also helps us statistically correct the data in the cases where we find ourselves measuring too few computers or computers used by someone else than a panel member (for a further discussion of this, see below).

The incentive system is partly based on how many computers a single panellist activates in the measurement and in order not to tempt anyone to over-or understate anything; the information of the panellists' computer setup is gathered before we tell them that we like them to be part of an ongoing measurement. Therefore, prior to telling the panel members what we are about to do, we find out:

- The number of computers used by each panel member;

- The number of persons sharing each computer;
- The percentage of the usage on each computer that is done by the panel member;
- The percentage of the panel member's total use that is done on each computer;
- The location of each computer (home, work, portable, other).

After collecting this data we ask the panel members to accept a simple cookie file on each of their computers. The cookie file is sent to their computers via a click on a link – it takes no installation, in fact the panel members do not even notice the cookie file being sent to them.

With the help of various reminders and incentives we make sure that the panellist accepts the cookie file on all the computers that he or she uses and not just the computer from which the initial survey is answered. In this process we also make sure that all computers that are used by more than one person has our cookie sending page as its browser start page. The start page is used to separate the panel member from other users of the computer (see below).

When comparing the number of work and home computers that are activated with a cookie with the number of home and work computers that the Swedish Internet users claim to use in questionnaire surveys, it turns out that both kinds of computers are represented at accurate levels, with no statistically significant bias at all. The main reason for this is that no installation is required on the client side and hence no corporate policy or public suspicion about foreign software is there to reduce the number of activated work computers. All that is needed is the sort of cookie file that any computer – home or work – receives in the dozens when just surfing the net. The single source connection with other media and TGI currencies left aside, this is the biggest difference between this measurement and other attempts to measure Internet by electronically monitoring the behaviour of a panel. For the first time all of the use is mirrored and not just the use from home.

Given the fact that roughly speaking a third of all Internet time in Sweden is spent at work and significantly more in some target groups this is an absolute necessity for any advertiser or media planner who wishes to fully understand how Internet works and benefit from it.

The site-centric traffic measurement– InsightXE

The traffic measurement has already been described in some detail. It is a browser- or cookie-based traffic measurement operating with the double aim to 1) give the electronic and editorial departments of clients some insights about the visitors' behaviour (in that sense InsightXE is a content management system); and 2) give the market department reliable figures to communicate to partners, buyers of advertisement space and the public at large.

An important aspect of InsightXE is that the sub-sites of a large website are measured separately as well as on an aggregated level and that the sub-sites are separated and labelled the same way as in the banner system. That way the measurement measures the exact same sections that are sold as advertisement space.

The customers get access to their own figures, at a very detailed level, in real time in an online interface that is protected by a password. Only the key figures are published in publicly accessible platforms such as the weekly top list and the Sesame software.

By placing an InsightXE cookie on the computers used by panel members, modified to include the ORVESTO identification number, we are able to use the InsightXE data capturing to monitor the surf patterns of a statistical sample (the panel) about whom we know a lot of other things.

Banner measurements and optimisation

Alongside the InsightXE traffic measurement RealMedia also offers banner management systems for the websites – the selling side of the process (OpenAdstream) – and for the agencies, the buying side (OpenAdvertiser). These systems too are cookie-based and the work to integrate them and turn them into one single platform has come a long way. In fact InsightXE and OpenAdstream are already integrated in a way allowing for behavioural targeting. The way this works can be illustrated by an example. Say a website has sold out the advertisement space in the Economy section. The website could then group the visitors (cookies) that have visited the Economy section at least X times the past X periods and then direct banners to that group wherever they are on the site. This way advertisers can find the same target group as on the Economy section without actually placing a banner in the sold out section. This concept is called InsightACT.

As the different RealMedia system converges they will automatically pick up the traffic of panel members. That means we will be able to provide TGI data on actual banner level.

The Sesame media planning platform

The media planning software Sesame is already being used by all media categories in Sweden. It was therefore an obvious decision to also add Internet into the same software package. Planners can now plan Internet cinema, print, television, radio and direct mail in the same software package and on a single source database.

It should be stressed that Sesame first and foremost is a planning tool – not a tool for post evaluation. By averaging, for example, four weeks to produce average weekly figures we are producing more stable figures. And when using data about historic events in drawing conclusions about the future, stable data are in every way preferable. But this also means that dramatic changes in audience size between one week and another will be smoothed. Since, however, the traffic figures are published simultaneously without any averaging, the short-term changes needed for post evaluation are reflected, though without TGI information.

As mentioned the panel is recruited from the ORVESTO Consumer respondents. But for obvious reasons all panel members do not originate from the most recent wave of ORVESTO Consumer. To make multimedia analysis possible between Internet and other media on the currency level (the most recent survey wave), Sesame is using a rather complex weighting, ascription and calibration routine to match the panel data with the most recent measurement of the other media. This, however, does not significantly change any patterns, since the panel and the most recent ORVESTO Consumer respondents all share the same TGI data. The weighting, ascription and calibration can be done with a very high precision.

The Internet figures are presented in Sesame in the same fashion as other media. The planner is given a great degree of freedom when analysing reach and frequency during different time spans and in different target groups. Sesame allows for everything from simple cross tabulations to complex planning based on OTS and with net and gross reach figures published side by side with the total campaign costs

Concept summary

All in all ORVESTO Internet is a very complex concept. It builds, however, solely on known and well-tested techniques. A low-tech postal survey is used to recruit a panel.

The data capture is based on simple cookie file transactions and the reporting is done in a tool long since well established on the Swedish market. In developing and marketing the concept it has been a key ambition to make this really simple for respondents, as graspable as possible to the market but as advanced as it takes in its production details.

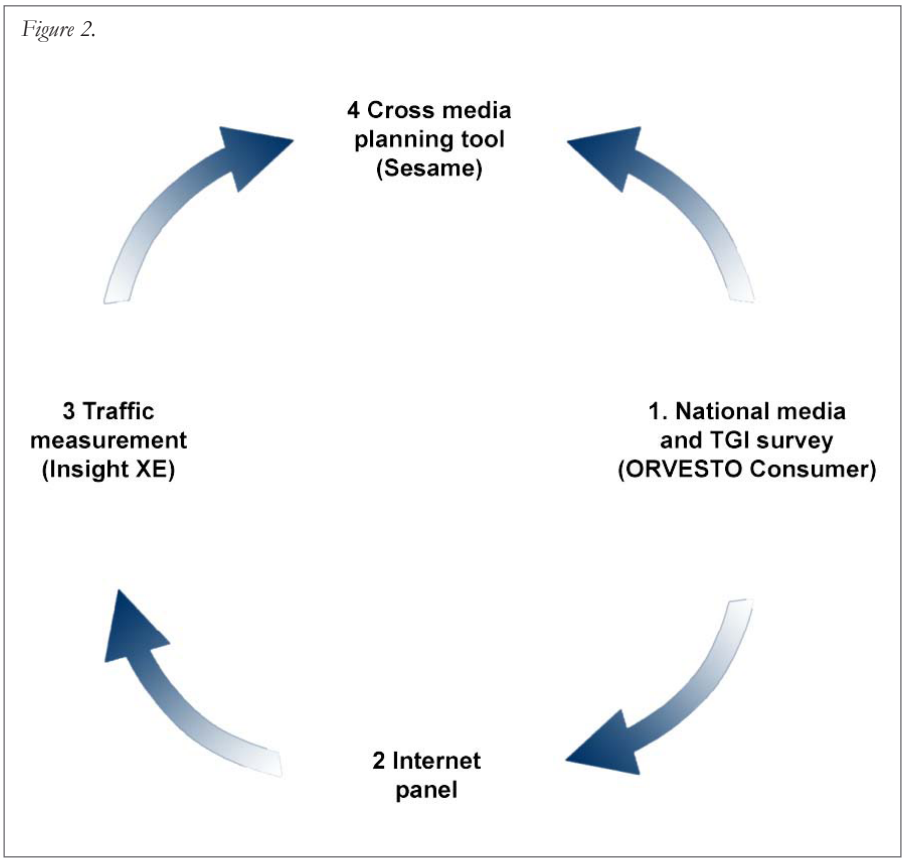
In drawing the full picture the multitude of system components may be confusing. Therefore, before moving on, it may be useful to stress once more what are the most important building bricks.

1. A national, postal media and TGI survey (ORVESTO Consumer) is used …
2. to recruit an Internet panel whose surf patterns are monitored with the help of …
3. the traffic measurement InsightXE.
4. The panel data and the totals from the traffic measurement are reported in the widely accepted planning tool Sesame …
5. as is the data from the initial media and TGI survey (ORVESTO Consumer), allowing for cross media analysis.

NOTES ON COMPARABILITY

It has been stressed before: if the Internet is ever going to become the brand building vehicle it has the potential of becoming, it needs to be measured in a way comparable to other media. To a large extent this is a matter of communication. Just starting to refer to the Internet audience in terms of reach and frequency rather than unique browsers, page impressions, click throughs and the like, is definitely a good start. But this is not enough. At the end of the day the measurements need to be comparable beyond semantics. In fact it is our firm belief that the Internet, due to the synergic role it often plays in broad-spectrum campaigns, not only has to be measured in a comparable way, but also in a cross-tabulatable way. Making an apple-to-apple comparison between a website and, for example, a newspaper is only the first step. The next step is to be able to analyse the percentage of the newspaper audience that belongs to the website audience and vice versa. The only proper way to do this is by the type of single source cross media measurement presented in this paper. But to make a electronic panel log comparable with a low-tech survey on print readership we need to find a common ground in terms of the audience opportunity to see (OTS) a given advertisement in a given vehicle at a given time.

Figure 2.



To make the Internet OTS comparable to other media

To make cross media comparisons the planner always needs to consider what value or weight should be applied to OTS measures of different media. Obviously all OTS are not created the same – different methodologies and definitions calls for the judgement of the planner to establish his own relative weights that reflect the probability of 'open eyes and/or ears in front of the advertisement'.

The media OTS is as close as we get to a common ground to evaluate different media, but this must not stop us from making sane judgements, with or without the research, to confirm our judgements on what the likelihood is to be not only exposed to the media but also to the advertisement, and consequently on what kind of response that is likely to occur. In Sesame the planner will use response functions which can be individually designed by the planner to determine what kind of response that he believes will occur.

A flexible tool-pack rather than a standard solution

So, how do we create a comparable Internet OTS? Well in fact at the moment we are unable to decide on a single solution. The planning of traditional media is surrounded by traditions that we have to take under consideration. For television the standard OTS definition is 'presence in the room with the TV set turned on' and for radio it is normally claimed 'listening to a 15-minute time slot'. For print media the OTS is often dichotomous – have or have not read any issue of a publication during the last publication interval of the title. And to complicate matters even more: on the Internet the number of page views has up until now been treated like an OTS measurement.

Defining the Internet OTS the TV way would give us higher figures than TV, because the advertisements are there more or less permanently and not just for 30 seconds every now and again. On the other hand, using the print definition we would end up with a theoretical maximum number of OTS equalling one per day, regardless if the audience have the habit of visiting the site one time

in the morning and one time in the afternoon. And using the number of page impressions as an OTS is simply too far from a common-sense conceptualisation of what constitutes an opportunity to see an Internet banner. If, for example, a person enters a webpage and presses 'refresh' three times in one second, with the effect that the mainframe reloads but the banner stays the same, he or she would be given three OTS – which of

course in no way is comparable with the print way of thinking of OTS as equal to reading the paper once – no matter for how long or how the pages are turned.

Consequently in Sesame the planner is given the freedom to make the OTS comparison in the best suitable way. All three definitions can be used and the length of time required at a certain page for an OTS to occur can be adjusted to match the length of time that the planner thinks is needed to note a particular advertisement. If for example the banner is situated below the scroll one might want to increase the time spent that is required.

THE NEED FOR TARGET GROUP DATA

Due to increased individualisation, media fragmentation and the increased need from advertisers to understand ROI development on smaller sub targets, the need for large sample research and rich target group data information is larger than ever. In a world where people are becoming increasingly more individualised and even traditional "reach all" advertisers seem to be starting to use advanced segmentation techniques, it is an obvious advantage to any media to offer the advertiser rich target group data.

Rich target group data is of course only really useful when the survey or the panel is large enough to use the richness of the data. With the use of statistical techniques even the most "specialised" target can be recreated in the database and accessible to the advertiser's planner. It is also obvious that to the more fragmented media such as Internet, cable and magazines, rich target group data is also a strong competitive advantage.

In the Orvesto Consumer/Internet survey the sample is both large and the target group data is rich. What at the moment seems to be the problem is the time lag that occurs between the main survey where target group data is being collected and the continuous Internet research – this poses a problem in some more volatile behavioural targets. Research is now being undertaken to determine which data is most sensitive to the time lag. However, since the panel data reported in Sesame is ascribed and calibrated to the most recent wave of ORVESTO Consumer, the TGI information used in any analysis is in effect up to date.

TRANSLATING COMPUTERS TO INDIVIDUALS

An aspect of the ORVESTO Internet measurement that deserves a little extra attention is the rather problematic procedure of translating the panel measurement of panel member computers into reliable data about a sample of individuals.

This issue has caused a lot of debate in Sweden when it comes to the site centric traffic measurements (such as InsightXE). Site centric measurements have the advantage of a very exact method of data capture. They do not, like ordinary surveys, rely on people's memory – they electronically log what people do whether they want it or not. And the data presented is not surrounded by margins of error in the statistical sense of the word, since site centric systems measure all traffic and not just the traffic of a random sample. On the other hand it is debatable to what extent the number of unique web browsers counted in a site centric measurement corresponds with the number of individuals. To make a long story short, basing the estimation of a website's audience size on a site centric measurement is dangerous for three reasons.

1. One and the same individual may use more than one computer to access the Internet. He or she will then appear as more than one individual in the statistics. In Sweden most of the Internet users have Internet access both from home and from work.
2. One and the same computer may be used by more than one person to access the Internet. A household of four, or worse, a public Internet café computer with dozens of daily users, will appear as a single individual.
3. One and the same individual using one and the same computer may block or delete his measurement cookie (purposely or accidentally) between visits to the same site. Since the system cannot identify the computer the individual will be presented as a new individual each time the website is visited.

But do these problems have anything to do with the panel measurement? Yes and no. It forces us to 1) make sure we measure all the computers used by the panel member, 2) separate the Internet use of the panel member from the use of others on the same computer, and 3) instruct the panel members not to delete their cookies and electronically make sure the cookie is regularly refreshed. But in contrast to site centric measurement these aspects can be kept under control and therefore, on the whole, the debate about cookie measurements giving bad estimates of audience sizes is not applicable for the panel measurement.

However, there is also an issue of how to communicate the Internet currency to the market. In short time spans like hours or even days, there is no real difference in the audience size of a given website as measured in the panel and the number of unique web browsers presented in the InsightXE site centric measurement. But as we turn to the weekly basis we find the site centric figures being significantly higher than in the panel measurement – and on the monthly level the site centric data is simply off the wall, whilst the audience size in the panel data accumulates as you would expect it to do. In fact the biggest websites in Sweden are counting more unique web browsers per month than there are inhabitants of Sweden. This is ridiculous of course, but can be understood from the three measurement errors described above – the longer the measurement period the likelier are people to lose their cookies or to show up on a website from more than one computer.

We intend to deal with this problem in two ways. One is to discourage the use of site centric figures on longer time spans than a week, the other is to present the site centric data in a fashion rather similar to the way circulation figures are published alongside the reach figures of print media – thereby implicating something like: yes, this is a very exact figure of the number of copies, but beware – there may be more (or less) than one reader per copy.

Making sure each of the panellist's computers are measured

Getting the panel members to activate all of their Internet access points is basically a matter of persuasion. This is done with the help of e-mail reminders in which we refer to the computers registered in the initial survey. In that survey the panellists are asked to label their computers in a way that they will know which computer is which when we refer to them. We also use an incentive system, based on premium bonds and hence a chance to win money, that encourages the panel members to activate all of their computers.

We do not, however, want computers in the measurement that are used by too many persons, since we would then run the risk of measuring Internet use of others than the actual panel members. Therefore computers that are situated outside home and work and that are used by more than six users are excluded. In effect that means that we miss the Internet use from libraries and Internet cafes, but that is considered a price worth paying for an otherwise very reliable measurement.

In the cases where we know a person uses more computers than he or she have activated, we use a rather complex procedure

for statistically ascribing traffic patterns to non-measured computers on the basis of similar computers used by similar people.

Filtering the traffic from other users of the same computer

A majority of the computers in Sweden are actually only used regularly by one person to surf the Internet. But there are, of course, a lot of computers in the measurement that are used by more than one person. The most common example of this is home computers that are used by different members of the same household. In order to separate the use of the panel members from the use of others we use a start page. The technique is very simple. After installing our page as the browser start page (this is done with a click and does not require any software downloads or the like) a question pops up each time the panel member starts the web browser or pushes 'home', asking the user whether or not he or she is a member of the SIFO Internet panel. This way of working is more or less identical to the way most TV meters work. As soon as the question is answered the user is directed to the normal start page, as it was defined before the computer was activated in the measurement. Thereby this only causes a few seconds delay each time a new person starts a surf session on the computer and the use of the start page is rewarded too in the incentive structure.

Once the data collection is made we also have a few procedures at the data processing level to correct measurement errors caused by multiple use of the same computer. Firstly there are a number of constraints making it impossible for any person to be measured from more than one computer at the same time, and then we use traditional weighting procedures to handle biases.

FUTURE AMBITIONS

As ORVESTO Internet is a rather complex concept as it is, we have concentrated on making a good measurement at the media title level. There are, however, various opportunities to expand the area covered by the concept. There is not room in this paper to go into any of these expansions in any detail but the three areas we have started to work on are:

1. TGI data at the actual banner level. Since the different RealMedia systems are in the process of conversion into one single system, we can use the panel to provide TGI data at the banner level without any modifications of the panel measurement. Experiments to test this path will be initiated during this spring.
2. From the possibility of connecting the panel to the banner system also comes an opportunity to integrate the panel data in the optimisation tools already offered by RealMedia. With Internet being very much of a target group media, this is a rather exciting potential that would allow planners to optimise campaigns not just in terms of impressions and click throughs, but also in terms of demographic targeting.
3. We are also planning to investigate the possibilities of using the RealMedia banner systems to gather data about Internet advertising spend. This is an area with few working industry solutions and therefore something that will be explored.

ADVANTAGES FOR THE INDUSTRY

As demonstrated, ORVESTO Internet covers many aspects of the industry's needs and has the potential to unfold into even more and into modules aimed different areas of the business. Let us sum up the main advantages for different players, as we see them

Internet

For the first time Internet publishers can show relevant information about audience behaviour – not limited to a small amount of target group data or site centric research but on the vast amount of TGI data based on a panel that fully accounts for the Internet use from home, work and other places.

Another advantage is that the Internet for the first time can be put into the same context as the other major media categories since the data is published in the same analytical tool as print and other media; the Internet can be expected to become a more natural ingredient in the media mix.

The media houses

To the media houses the new approach gives them the possibility to fully evaluate and develop their off and online brands in the same direction. The possibilities for cross selling increases also when the media houses can show the full potential of their offer to clients. The TGI data also gives the Media houses the means to build brands and segment their users/viewers/readers in a more advanced way and to exploit the synergy effects between different media that will occur in a mixed campaign.

The advertisers

The advertisers will be able to work in a straight line using their own carefully chosen segments and targets all the way through the whole media planning process. Orvesto Internet works in two different ways; firstly as a cross media reach and frequency tool it can be used for traditional brand building exercises, and secondly the electronic measurement system can then be used to optimise direct response. This will give advertisers better response both in the long and the short term perspective.

The agencies

The agencies need a dual focus in the Internet planning process. Firstly they need to focus on brand building and cross media planning because in a cross media world the focus will have to be on communication and the understanding of synergies between media – this will also mean that media agencies need to move from the logistical aspects of the planning process into the more consultative and communication heavy parts of the process. This is a strategic process. This might mean that agencies need to reorganise themselves and appoint more strategically focused cross media consultants and then they will get the recognition they fully deserve.

Secondly, they need to focus on direct response and understand what the drivers behind response are. The new planning software will be able to combine all these different objectives and skill sets in one working single source environment.

And finally …

The really good news is that with only minor changes to the original TGI survey the Orvesto Internet methodology could be used on any TGI database in the world.

THE AUTHORS

Peter Callius
Senior Advisor, SIFO RI

Anders Lithner
Research Director, SIFO RI

Stefan Svanfeldt
General Manager, SIFO RI