

# Apollo's 're-entry': a new death for single-source

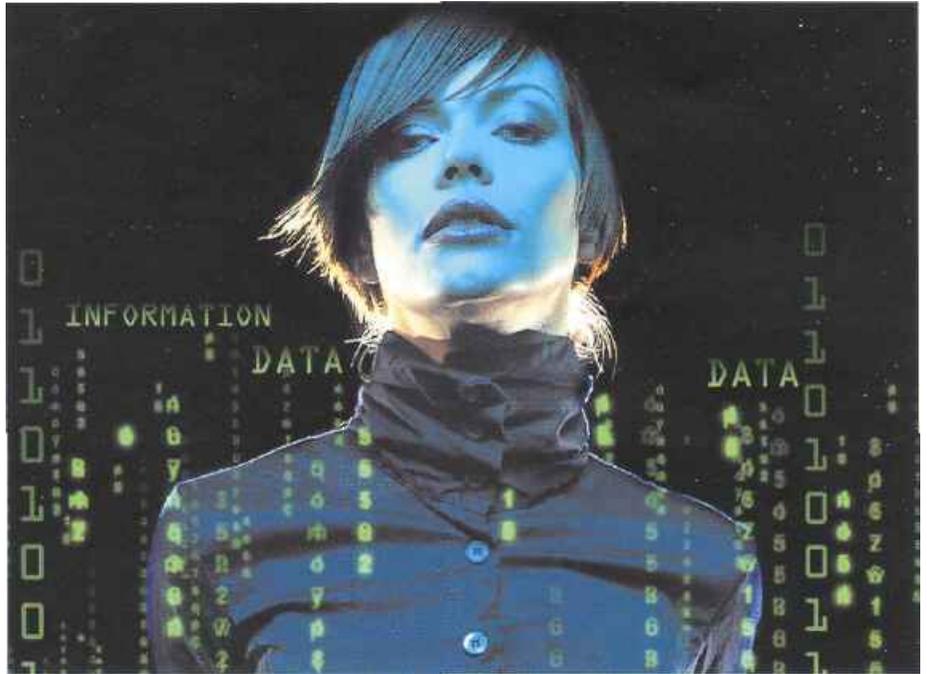
Project Apollo has crashed. **Roderick White**, Admap, reviews the consequences of a multi-million-dollar experiment

**A**FTER NEARLY FIVE years and investment reported to have exceeded US\$40 million, Project Apollo has been killed off, with the two research agencies involved, Arbitron (whose PPM provided the main source of media-exposure data) and Nielsen (whose Homespun panel provided purchase data for the main, packaged goods categories covered by the project), saying that they had not been able to recruit enough sponsors, at an annual US\$1 million + each (i), beyond the original seven major advertisers involved in the pilot, to make the project roll-out a viable proposition. As a result, Apollo adds yet another to a growing list of single-source research projects, in by now a variety of countries, that have run out of financial steam, over a 40-year period.

This must be regretted by anyone in marketing who was hoping to see the evolution of single-source, multi-media research from test-bed to an operational future on a national or near-national scale (2). Instead, it must be hoped, the data from the extensive pilot will eventually become available to researchers as a working laboratory resource - as has occurred with other large single-source projects around the world. (Most of these, it must be admitted, were less ambitious in terms of, particularly, their media audience research capabilities than Apollo: generally, they have looked almost exclusively at TV exposure plus, by proxy, the effects of promotional activity, with little or no ability to access exposure to other media.)

## Ambition

That said, it is certainly worth noting that Apollo was never going to meet the ambitious spec outlined for it by Nielsen. Nielsen proclaimed Apollo as being a research tool that would deliver, inter alia, a 'day-in-the-life' overview of individuals' media exposure. In practice, of course, the technology's ability to monitor print media, or outdoor, was effectively non-existent, and, indeed, print data were provided through old-fashioned survey techniques. More importantly for the future, as online media specialists quickly - and contemptuously - pointed out, the only online exposure that could be meas-



ured by Arbitron's PPM was streaming video and audio, so that there would be no coverage whatever of search or even banner ads, let alone blogs or corporate or comparison websites.

(It was, however, disingenuous of the online fraternity to complain, in this context, that this sort of online 'traffic' has become critical to lots of high-information product categories, since it was by that stage clear that, in its early development at least, Apollo was squarely focused on what its main originators, Nielsen and P&G knows best - fmcg (packaged goods) markets - even though some data on more expensive purchases were collected through survey methods.)

While Project Apollo can be viewed as a heroic failure, there are more aggressive critics. For example, according to marketing blog Magnosticism, while single-source remains the 'holy grail', Apollo has merely set the cause back, single-source measurement is a critically important, yet highly complex, and therefore an extremely elusive goal of marketers. The millions of dollars wasted on Apollo won't help the cause (3).

A more balanced and considered opinion from MarketingNPV suggests rather similar conclusions.

'Several barriers remain on the road to single-source nirvana, including the following.

>- An inability to link data in a standardised way: the consumer packaged goods (CPG) industry - the primary focus of the Apollo pilot - is one of the few verticals that has the systems to link to behavioural data in a standardised fashion. This will limit the application of any cross-industry initiative to create a single source, unless other verticals decide to mirror CPG's approach. Arbitron is pushing the thinking about extending standardised data systems to other industries.

>• Media fragmentation: the ongoing fragmentation of media-'traditional' internet, DVR systems, social media, mobile and beyond - makes it increasingly difficult for marketers to get their arms around an ever-growing pile of data, even without the added challenge of managing it all from a single source. The technology-driven landscape changes so quickly that measurement firms will be hard pressed to develop a system that is nimble enough to accommodate all forms of emerging media.

\*• A myopic view of the currency: media fragmentation has also created a growing disparity between how media are bought, how they're executed and how they're



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measured. Each, medium has its own form of currency (for example, GRPs for TV), and different groups are used to looking at pieces of the marketing mix in their own way. A media buyer might say the currency has to be in GRPs. A brand manager might view spending as the key metric. A single source will require a common measurement link among incompatible currencies.

> Limitations of sampling methodologies: current technologies that would enable single-source media measurement require panelists. The more you try to slice and dice such an audience across different media, the smaller the sample sizes get, and the more difficult it becomes to pull out meaningful insights - even if all those data reside in a single database'(4).

### The nine Cs

A detailed examination of the various papers that have been published with findings from Apollo, and explanations of how it either did or was meant to work, produce an extraordinary array of 'Cs' (see box), most of which are more or less negative in their implications, with the clear exception of the first, consumer-centricity, which was the guiding inspiration for the thinking behind the project.

With hindsight, it is easy enough to say that Apollo:

^ was not comprehensive enough to cope with the continuing fragmentation of media - and, very possibly, never could be

> cost too much even for very large advertisers to be prepared to buy in for the longer term

^ required massive computing power to achieve the sort of analyses that it promised to provide - though it was predicated on the existence of this sort of computing ability with today's technology

> suffered from its inherent complexity; which the computers were supposed to be able to cope with; nonetheless, it is clear from the comments of people closely involved with the project that the tools and capabilities available for mining the data were inadequate, at least to produce results on a usable time scale, even though there has been a great deal of valuable work done in this area

^ as a result, failed to gain the commitment needed from a larger number of advertisers to enable it to continue.

On the other hand, the panel's compliance, as measured by the proportion of individuals who wore the PPM regularly and continuously, was impressively high, though it's legitimate to speculate how long this might have continued; cooperation from both the media involved and the (very large) advertisers who funded the project seems to have been good, though it took time to get media coverage as high as the researchers would have wished; and there were complaints to the last about the adequacy of the coding of commercials and in some cases programming that enabled the PPM to identify the material to which it was exposed.

Technically, Apollo seems to have worked pretty well, within its limitations.

### Uses and benefits

The surface of the range of ways in which Apollo's data could be exploited has, arguably, barely been scraped.

Papers at a variety of conferences (5) have shown how the data can be used:

>• to refine targeting of media, basically by focusing on different categories of category or brand user, rather than on the demographics normally used in (in particular) TV planning

> to provide clear evidence both of the positive effects of ad exposure on product purchasing and of the defensive value of ad exposure in the face of competitive activity

\*• in the context of the US TV market, where advertisers buy a substantial inventory of TV time in the upfront, to improve allocation of this inventory between brands

to provide the ability to identify the payback to marketing campaigns at the level of the individual household, or, at least, that of defined groups of heavy, light and medium brand users.

All these are valuable contributions, and could be seen to provide significant, quantified benefits to real, live brands, in the marketplace.

There is as yet less published evidence, though the data should be able to provide it, to show how multi-media campaigns work - which is arguably the most important potential value for Apollo (even given the very real limitations of its media coverage).

But there is ample room for further analysis to explore this area, and little doubt that the findings can provide genuine learnings for the future. What we have, though, if the data are made available, is a marketing science laboratory, not the practical, working marketplace monitor we had all hoped for.

1. For the pilot, £350,000.
2. For example, R Kennedy, C McDonald and B Sharp: *Pure single-source data and take-off time for Project Apollo*. Admap 491, February 2008.
3. <http://magnostic.wordpress.com/2008/02/29/marketing-measurement-misplay-project-apollo-is-dead/>
4. [http://marketingnpv.com/articks/features/the\\_rocku\\_road\\_to\\_sing!e\\_source](http://marketingnpv.com/articks/features/the_rocku_road_to_sing!e_source)
5. For example, D Gloeckler, L Dupree and L Wood: *Project Apollo's spotlight on consumers and ROI - results preview from USA pilot*. ESOMAR WMj, Shanghai, June 2006; B Flaherty: *Project Apollo and ad impact: improving returns from media expenditures*. ESOMAR WMj, Dublin, June 2007; L Wood and D Gloeckler: *Project Apollo: c&isumer-centric insights - the dawn of a new era of advertising research*. ESOMAR WM3 Dublin, June 2007.



**The nine Cs of Apollo**

1. customer-centricity
2. comprehensiveness
3. cost
4. computing power
5. complexity
6. commitment
7. compliance
8. cooperation
9. coding