

Measuring media internet

Richard Foan, ABCe, outlines progress in measuring online media 'circulation' as a key element in today's media planning

IN ORDER TO measure something, it is a good start to understand what you are looking at. However, the internet, by its very nature, is far from a tangible, predictable entity. It has rapidly developed into an endless, living, breathing organism that constantly extends under new guises.

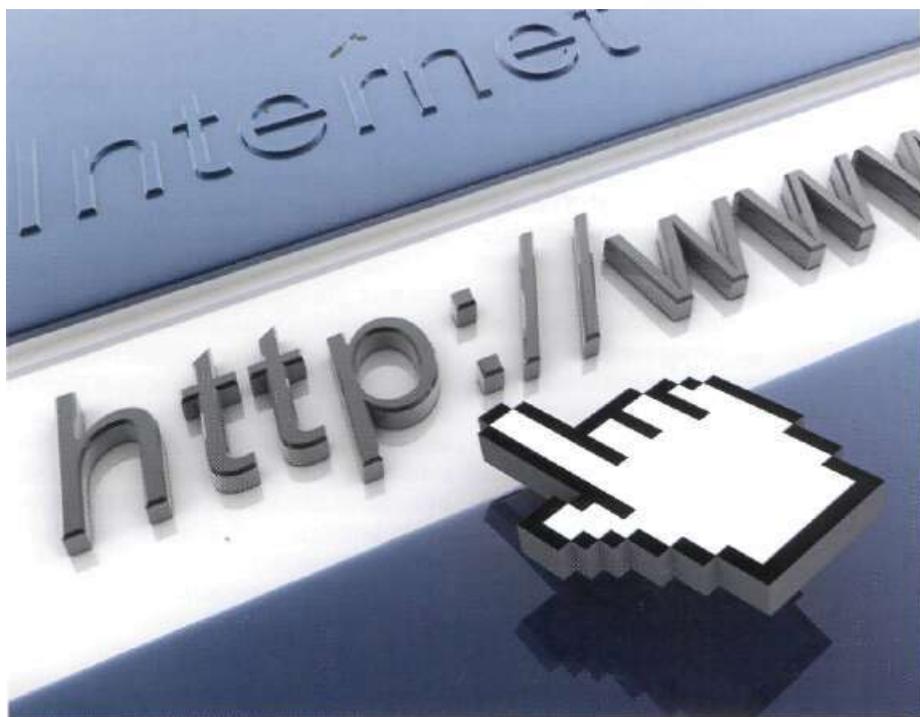
Gone are the days of the internet being a collection of static web pages. Now it extends across almost every platform and is intertwined with nearly every medium. TV, radio and mobile are now directly connected, literally, with the internet. Such is the change that the terms TV and radio are fast becoming redundant, in exchange for the terms video and audio, as the English language evolves to keep up.

The fragmentation of media has created more niche audiences than ever before. And they are constantly dividing and subdividing, and regrouping in many different forms at different levels on a national, even global, scale. Citizen publishers have created a new source of content. Publishers and broadcasters are now media companies with a mixed content offering.

The effects of the fragmentation of media and emergence of Web 2.0, among other things, have made it increasingly challenging for sample-based research to measure these fragmented audiences accurately. For instance, there might be 1,000 people a month who are regularly visiting a blog on gardening. These people have distinct interests and needs, and may well be a very valuable audience; however in a country of approximately 70 million, these people are simply not being picked up.

That is not to say that progress isn't being made. Over the past two years nearly all the national newspaper brands have committed to publishing their monthly web traffic figures to industry-agreed standards. For the month of March, *The Daily Mail*, *Financial Times*, the *Guardian*, *Mirror*, *Sun*, *The Times* and *Telegraph* all reported their web traffic as audited by ABCe - an unprecedented number (see Table i).

More recently *Telegraph.co.uk* recorded 18,646,112 unique user/browsers for April with, interestingly, over six million



coming from the UK and over 12 million from the rest of the world (see Table 2). National newspaper brands are leading the field with the frequency of reporting their online properties. The men's publishing sector is another keen to demonstrate its digital reach. Titles including *FHM*, *Loaded*, *Monkey*, *NME*, *Nuts*, *the Sun Online* and *Zoo* all report their web traffic through ABCe. *Zoo*, for instance, commanded 807,059 unique users in January in addition to its total average print circulation of 179,006 for the second part of 2007 (see Table 3).

Clearly multi-platform extensions for magazine brands are tapping into new audiences, offering advertisers exciting cross-platform options and opening up new revenue streams. Other sectors tapping into the benefits from regular web traffic reporting include the recruitment, business publishing, sport, automotive, lifestyle, travel, consumer publishing, property and gaming sectors.

Publishers reporting their online traffic through ABCe to industry-agreed standards is a step forward, as greater transparency will better inform advertisers

and media agencies in their decisions when allocating advertising budgets.

However, Web 2.0 and the natural development of the internet have brought a host of new opportunities and challenges for measuring the internet in the shape of blogs, video, audio, RSS feeds, podcasts, and so the list goes on.

For many years JICWEBS (the Joint Industry Committee for Web Standards in the UK and Ireland) has worked to ensure independent development and ownership of standards for measuring site-centric, transactional web data. The body, whose members include the LAB, IFA, ISBA, the NPA, NS and AOP (i), has moved fast to agree and evolve measurement standards for developing media against which ABCe can audit.

Right now the TV, radio and mobile industry sectors are making positive steps to establish industry-backed measurement standards to help quantify online audiences.

Broadcasters have been swift to make moves to measure video delivered over the internet. Last year the major broadcasters came together to form the BMWG

(Broadband Measurement Working Group) to develop a common approach for measuring online video content viewing to deliver accountability to rights holders.

The group, chaired by Ron Coornber, is made up from BBC, BSkyB, BT Vision, Channel 4, Five, ITV, Virgin Media and industry body the IPA, as well as ABCe, The UK TV audience measurement body BARB also joins the meetings as an observer. The group has tasked ABCe to develop a rights metric for measuring content delivered over IPTV, including simulcast, streams and downloads. The rights metric will enable broadcasters to measure and report video content to a consistent and agreed standard for those rights holders.

Broadcasters clearly feel that video over the internet has reached a point where a reliable measurement tool is needed. This is particularly important for commercial broadcasters, who are investing a great deal in developing a variety of video-on-demand services and will need to generate revenue from video advertising to sustain their businesses.

While BARB is investigating other techniques to be able to assess the people side (who is watching), the BMWG project could provide granular information on the screen side (what the equipment is being used for). A common goal would be to connect these two types of information when an appropriate means is agreed upon.

Industry-agreed standards for measuring simulcast, streams and downloads over the internet will add the vital element of trust in the medium, enabling advertisers, broadcasters and rights holders to use them with the professionalism and confidence of traditional TV advertising.

Another sector keen to measure its online presence is the mobile industry. This year the GSMA, the global mobile operators association, charged ABCe to develop and deliver industry-agreed standards for the reporting of all web traffic over mobile phones.

The move to establish industry-backed mobile metrics has been initiated by the demand from operators and advertisers for effective reporting and accountability,

in order to secure investment and to justify driving media budgets to mobile.

ABCe will make its recommendations on the project to the UK industry standards body, JICWEBS, who will ratify that the measures meet the industry-agreed needs. Clearly mobile has a tremendous capacity to deliver as a marketing channel, but this is dependent on the mobile industry's ability to provide reliable usage data to justify the interest. It is hoped that this project will help deliver the missing link.

While this project will focus on the UK market, the GSMA is a global association and has the ambition to deliver standards in other countries, so the scale of the project is potentially very large indeed. ABCe champions the phrase 'global standards for local markets' as a mantra for internet measurement with localised reporting rules. Obviously the internet is a global >

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TABLE 1

ABC multi-platform report, April 2008 (year-on-year comparison)

Publishing group and platform	Title	Certified figure April 2008	Certified figure 2007	Yr-on-yr % change
<i>Associated Newspapers</i>				
Newspaper	<i>The Daily Mail</i>	2,324,428	2,300,420	1.0
Newspaper	<i>The Mail on Sunday</i>	2,292,718	2,333,699	-1.8
Newspaper	<i>Evening Standard</i>	281,187	266,214	5.6
Online	MailOnline	18,039,943	9,347,544	92.9
<i>Guardian News and Media</i>				
Newspaper	<i>The Guardian</i>	351,031	366,556	-4.2
Newspaper	<i>The Observer</i>	452,009	463,128	-2.4
Online	guardian.co.uk	18,546,017	15,170,348	22.3
<i>Mirror Group</i>				
Newspaper	<i>Daily Mirror</i>	1,478,036	1,537,143	-3.6
Newspaper	<i>Sunday Mirror</i>	1,338,352	1,399,690	-4.4
Newspaper	<i>The People</i>	658,905	721,667	-8.7
Online	Mirror Group Digital	4,277,502	N/A	N/A
<i>News International</i>				
Newspaper	<i>The Sun</i>	3,131,919	3,047,527	2.8
Newspaper	<i>The Times</i>	618,160	629,157	-1.8
Newspaper	<i>News of the World</i>	3,192,419	3,282,263	-2.7
Newspaper	<i>The Sunday Times</i>	1,202,235	1,231,153	-2.4
Online	<i>The Sun</i>	14,068,523	8,235,925	70.8
Online	Times Online	15,406,254	8,905,701	72.9
<i>Telegraph Media</i>				
Newspaper	<i>The Daily Telegraph</i>	871,598	898,817	-3.0
Newspaper	<i>The Sunday Telegraph</i>	636,719	666,905	-4.5
Online	Telegraph	18,646,112	7,359,312	153.4

TABLE 2

ABC multi-platform report, April 2008 (current month by geography)

Publishing group and platform	Title	Certified figure, April 2008	UK total	Rof* total	Other countries total
<i>Associated Newspapers</i>					
Newspaper	<i>The Daily Mail</i>	2,324,428	2,160,775	59,478	104,175
Newspaper	<i>The Mail on Sunday</i>	2,292,718	2,073,286	111,018	108,414
Newspaper	<i>Evening Standard</i>	281,187	281,187	0	0
Online	MailOnline	18,039,943	5,416,065	N/A	12,623,877
<i>Guardian News and Media</i>					
Newspaper	<i>The Guardian</i>	351,031	306,199	5,176	39,656
Newspaper	<i>The Observer</i>	452,009	400,627	12,693	38,689
Online	guardian.co.uk	18,546,017	7,762,826	N/A	10,783,191
<i>Mirror Group</i>					
Newspaper	<i>Daily Mirror</i>	1,478,036	1,368,808	69,137	40,091
Newspaper	<i>Sunday Mirror</i>	1,338,352	1,260,687	42,542	35,123
Newspaper	<i>The People</i>	658,905	608,568	28,603	21,734
Online	Mirror Group Digital	4,277,502	2,542,585	N/A	1,734,917
<i>News International</i>					
Newspaper	<i>The Sun</i>	3,131,919	2,979,580	104,375	47,964
Newspaper	<i>The Times</i>	618,160	588,006	3,561	26,593
Newspaper	<i>News of the World</i>	3,192,419	2,985,443	149,539	57,437
Newspaper	<i>The Sunday Times</i>	1,202,235	1,038,279	107,189	56,767
Online	<i>The Sun</i>	14,068,523	5,533,141	N/A	8,535,382
Online	Times Online	15,406,254	5,637,402	N/A	9,768,852
<i>Telegraph Media</i>					
Newspaper	<i>The Daily Telegraph</i>	871,598	821,466	3,443	46,689
Newspaper	<i>The Sunday Telegraph</i>	636,719	606,229	2,976	27,514
Online	Telegraph	18,646,112	6,327,348	N/A	12,318,764

*Republic of Ireland

medium and so the international implications can't be ignored. In fact, global measurement structures are helpful. The International Federation of Audit Bureaus of Circulation (IFABC) draws together ABCe's sister organisations across the globe to implement constructive international measurement initiatives.

However, advertising budgets, for which internet measurement is largely required, are still determined in local markets and so require measurement for individual territories. Furthermore, different countries often have dissimilar methods of measuring traditional media, which have shaped the practices for measurement of digital media to allow a level of comparison. While an international focus is essential, localised standards are paramount.

Another sector heavily affected by the growth of the internet is the radio industry. Increasing numbers of people are

listening online, and sooner or later these people will have to be accounted for. Rajar recently announced that it is turning to an online diary system to record listener numbers, and it will be interesting to see what proportion of listeners consume content online. However a sample-based approach can go only so far on its own.

Nothing makes this point more patently clear than comparing sample and transaction-based data for supposedly the same websites. The most recent figures for football club site arsenal.com are a case in point. ABCe recorded 2,504,308 unique users/browsers (in other words, devices connecting to that site), comScore recorded 1,774,000 unique visitors and Nielsen/NetRatings reported a unique audience of 311,485 for user traffic on the club's website in the same one-month period.

One option is to tie transaction data to sample-based data - potentially securing the best of both worlds. Nielsen Online,

Survey Interactive, Stir in Holland, Agof in Germany, CIM in Belgium and Gemius in Poland and Israel are already fusing transaction data with sample-based data, in addition to following the total activity through websites in the territories. With modelling, these organisations are creating an impressive, bigger picture of online activity.

The UK market, however, is considerably trickier to ring-fence. The sheer number of media and their international focus present a number of challenges. With English the common language in business, online and across most of the western world, traffic on English-speaking websites can have a considerable international following. For instance, millions upon millions of US-based web users visit UK-based websites, and vice versa.

Again, the Spanish and South American territories may have difficulty separating web users along political

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boundaries, due to the shared language facilitating internet activity on an international basis.

With audience and channel fragmentation rife, the one thing that can shed light on users are IP addresses for a single visit. Whether someone is using Instant Messenger, looking at a blog or website, receiving an RSS feed or watching streaming video content (to name a few of the multiple options) the one thing that identifies a machine and tracks activity is the IP address.

Tracking online behaviour based on IP addresses could potentially make online the best-measured medium out there. However, the major challenge here is that IP addresses aren't permanently fixed to a specific computer.

The current industry-agreed approach of using IP and user agent data to underpin the unique user/browser metric helps get closer to the number of devices used. The important principle is to be transparent in the definitions used and encourage compatibility through standards.

Taking measurement of the internet to its ultimate limit - and arguably too far - would be for humans to have a specific unique IP address. So every time someone logged on to the internet they would input

their code, possibly by iris recognition. Obviously there are a host of privacy issues and social factors that make this 'Nineteen Eighty-Four' style solution unlikely ever to be realised. The furore around the debate on whether UK citizens should carry ID cards, and the developing opposition to internet monitoring services like Phorm, just go to show the likely level of resistance.

In truth, measurement of the media has always had to compromise, and it probably always will. This applies to online measurement as well as offline.

The immediate challenge is for ABCe and the media industry to continue to build a critical mass of online media reporting their traffic data to industry-agreed standards. In recent years a host of new and traditional media owners have opened up to reporting their digital audience data to industry-agreed standards through ABCe, and the momentum continues to build.

The more media owners that report their online audience data, the better the result will be for everyone. Improved standards of online measurement will result in better insight and an increase in confidence in the medium.

With considerable budgets being invested online by advertisers and media owners, the commercial interest around the internet has never been so great. The best agencies have grasped the opportunities for brands in Web 2.0, and media owners are increasingly relying on online as a central business pillar. Online is no longer an add-on or a testing ground. Instead it has become a central part of business plans.

The media industry has now truly recognised the benefits of trusted industry-approved data as part of the process of monetising online media; 2008 is set to be the year when this approach comes into its own.

1. Internet Advertising Bureau, Institute of Practitioners in Advertising, Incorporated Society of British Advertisers, Newspaper Publishers Association, Newspaper Society, Association of Online Publishers.

TABLE 3

Analysis of men's lifestyle sector

Title	Actively purchase percentage	Print platform certified figure July-Dec 2007	Yr-on-yr % change	Online certified figure	Online audit period
Shortlist	0.0	462,731	N/A	N/A	
Sport	0.0	317,209	N/A	N/A	
FHM	100.0	315,149	-15.1	2,033,105	1/4/08-30/4/08
Nuts	100.0	270,053	-8.5	945,790	1/11/07-30/11/07
Men's Health	94.3	240,315	0.7	301,193	1/1/08-31/01/08
Zoo	100.0	179,006	-12.5	916,244	1/4/08-30/4/08
GQ	90.9	129,520	1.6	N/A	
Loaded	100.0	115,065	-29.2	308,442	1/11/07-30/11/07
Stuff	99.7	96,866	-3.4	N/A	
Maxim	99.9	78,463	-40.3	N/A	
Men's Fitness	99.9	65,504	0.6	N/A	
BBC Focus	99.3	65,301	10.1	N/A	
T3	88.9	60,028	8.4	646,447	1/11/07-30/11/07
Esquire	83.1	59,800	14.0	N/A	
Bizarre	100.0	50,132	-17.4	N/A	
Arena	100.0	25,232	-27.0	N/A	
Monkey	0.0	N/A	N/A	942,184	1/1/08-31/1/08

 More on measuring the internet at WARC Online