

# OUTDOOR - A Global Medium in Search of Global Measurement Standards

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OUTDOOR – A Global Medium in Search of Global Measurement Standards, By Manfred Mareck, Research Marketing Ltd, London

Since the early 1990s the Outdoor industry has been growing in many countries – thanks largely to better site classification, site maintenance and advances in audience measurement. In a number of markets GPS-based technology has been introduced over the past few years to provide better estimates of the public's exposure to poster sites, but a number of problems are still unresolved.

One of them is how to adjust inflated "opportunities to see" to arrive at more realistic "likelihood to see" levels. Many have by now introduced some form of "visibility adjusted impacts" (VAI) but all do it slightly differently and some, such as Italy opted to use "duration to view" as an alternative. Even in markets where VAIs are in use there are no universal standards for the definition of a "contact", and it is unlikely that there will be in the near future.

## To Model or Not to Model?

Introducing GPS-panels is not cheap and consequently sample sizes are always under scrutiny. Indeed a 900-strong panel for the Chicago and surrounding area (adult population of over seven million) provides only the minimum of empirical data. (In comparison, the Swiss Outdoor Survey uses 600 respondents to represent the 100,000-strong Winterthur conurbation). Not surprisingly, census-type traffic statistics are often integrated into the modelling of data, which has led to some strange bedfellows joining the Outdoor measurement community. In Switzerland models used in medical survival analysis have been adapted to make sense of the outdoor data collected in major urban areas. Apparently the pattern of probabilities of dying within a certain time interval is similar to that of "seeing" a particular poster. In Spain, Heissenberg's Uncertainty Principle makes an appearance in the modelling of data that predicts when and where a pedestrian and a bus will meet along the same stretch of road, thus calculating the probability of exposure to a poster on the back of the bus. My advice: if you want to catch a bus don't just study the timetable, read up on your quantum physics as well.

## Cross Media Compatibility

To allow for better multi-media comparison a number of agency delegates at this year's Worldwide Audience Measurement Conference pressed for more compatibility of outdoor data with the metrics used for other media. Outdoor contractors tend to be supportive – presumably in the hope that this will give them a larger share of the advertising budget. But there is a danger that this strategy could backfire. Focusing too much on reach and frequency scores could dilute the distinctive benefits of the outdoor medium, such as its constant availability (always on), the creative impact of large sites or the strategic locations at the point of purchase, around shopping centres for example. It is debatable how much it would help Outdoor if the medium ends up being bought on the same criteria as TV. Indeed a number of agency delegates argued strongly that Outdoor's key task was to establish and sell its strategic role in the communications process. Furthermore, for true cross-media comparison to become reality we need more hard data to measure exposure duplication between different media. Current software usually works on the assumption of random duplication, hence the call for more single source studies to measure the exposure probabilities of all major media.

Outdoor audience research should continue to move toward passive measurement, even if progress is currently slow - in North America, the world's largest advertising market only Chicago has a functioning GPS panel. Similar developments in Canada are currently on hold, due to the high price of the necessary hardware. If a number of major markets could agree on joint standards, they could purchase larger quantities of GPS receivers at much lower rates and bring down unit costs. (The same also holds true for other passive measurement systems for Television or Radio). It would not automatically lead to a global consensus on visibility adjustments or multi-media evaluation, but it would be a start. As it is the chance for a global gold standard seems remote, at least in the short run. What outdoor audience measurement needs is even more vision and advertisers who are willing to get more directly involved rather than delegating responsibility to their advertising agencies, according to Mark Kaline, [PLEASE CHECK HIS EXACT TITLE] of Ford Motor Company. In his keynote speech at WAM he encouraged delegates not to be afraid to kill old habits and invent something new. Let's hope they were listening.

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