

**GRP.**

Exploring Media

**SPECIAL CIM MORNING 17/11/11**

# **CIM cross media research : a difficult conception.**

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# Happy anniversary

- 2011 : 40 years CIM
- 2012 : 40 years PMPA study

Initiated by the press.

Double objective :

- describe target groups,
- give multi media context.

Basic principles never changed.  
But the 40th edition 2012  
could be the last one!



# I. Lamentatio

**Marketing** has become **more difficult**.

- Increased product differentiation & consumer segmentation.
- More mediatypes, more media, fragmentation of audiences.

**Communication planning** got **more sophisticated**.

- It started with mono media Reach & Frequency planning.

**One solution fits all.**

- To become strategic cross media planning.

**Choose the best mix you can afford.**

- Reaching today for the Consumer Journey.

**Target a precise consumer segment**

and **influence critical steps** in their decision **process**.

...mean changing demands to media agencies:

- Go beyond classical media to **all relevant touchpoints**.
- Move **up on the impact** ladder.
- Take **synergy** between touchpoints into account.
- Increase **ROI**.
  
- And don't forget about **WOM and social media...**

- **Increased competition**, development of long tail.
- **Diversification** into multimedia.
- Digitization and **multi device**.
- **Blurring of boundaries** between content and platform providers.
- Pressure on classical revenue streams, **uncertain new business models**.
- Internet feeds the **illusion of total measureability and accountability...**

- **Integrated 'new' mediatypes** over the years.
- Continued to measure **Reach & Frequency**.
- Favoured international **best practices and quality samples**.
- **Defensive** towards new initiatives within and outside CIM.
- Offering the **same cross media answer** to new questions :
  - single source declarative data from the PMPA,
  - with an 'artificial' Heavy-Medium-Light typology by mediatype,
  - and **no link** with currencies (except Press).

It looks as if the CIM **refuses to redefine its role ?**



# **II. Responsorium internationalis**



“Advertisers  
are **unable**  
**to measure and track**  
target groups’  
**holistic and synergistic**  
**multi-media behavior.”**

**Blueprint** for  
**consumer-centric holistic**  
**measurement**

- Transparent **common metrics** across the different media.
- **Faster** and continuous data.
- **Large sample** sizes.
- Better target group descriptions **beyond demographics.**
- **Passive measurement** systems  
to better reflect holistic communication.



The final **single source** study combining

- **passive media** consumption **data** (Arbitron),
- consumer product **purchasing** data (Nielsen)

to better correlate media impact and purchase.

# Unfortunately...



USA  
Apollo project  
implodes  
in 2008.

WFA's Industry Goals proved to be a bit optimistic/unrealistic.

# UK launches TouchPoints

- In 2006, the **UK** Institute for Practitioners in Advertising (IPA) publishes **TouchPoints** (TNS Kantar):
  - A week in the life of British adults.
  - Self-completion questionnaire + PDA based diary.
  - n= 5.010, increased to 6.000.



- Time budget study serves as HUB for fusing currency studies.
- Today, TouchPoints 4.0 is in progress (publication 2012).
- **Time budget** data are **widely used**.
- Multichannel planner (and **pluritactical** cross media data) are **fully used some**, not by others.
- Currently exported to USA...

- In 2008, a collaboration of Affimétrie, AudiPresse and Médiamétrie publishes the first Cross Média study.




- A HUB study serves as basis for fusion of the currency studies.
- Basis is **not full time budget study** but declarative data on mediatype and individual media useage by timeslot or frequency.
- n= 10.000, increased to 15.000

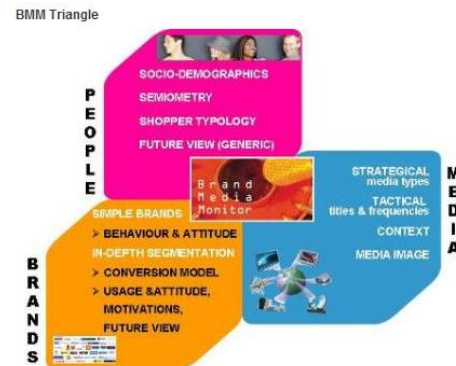


- They invent **proprietary touchpoints studies**.
- Some international, some local.
- Mostly **declarative** studies relying heavily on the capacity of respondents to remember and **rationalize their behavior**.
- Respondents are asked to declare or **evaluate** touchpoints **by sector**, thus filling an essential gap.

# **II. Responsorium belgicus**

# What about Belgium ?

1.  Brand Media Monitor, declarative only, **since 2000...**



2. Several agencies have launched their local or international touchpoints approach, always sector specific.
3. And **CIM** ?  
It's euh, complicated. No easy agreement on goal setting.

- Potentially unrealistic mix of expectations
  - on strategic channel selection,
  - precise targeting requirements,
  - overall ROI needs.
- Bias towards tv+ from some big advertisers.
- No agreed vision on 'scope of consumer centricism' (touchpoints, attitudes, sector specific behavior, brand usage...).
- **Any 360° story should be sector, if not brand, specific.**

- Should 360° lead to a positioning or to a working tool?
- Pressure from network to use their branded tool.
- “No internal capacity to use 360° data.”
- Beware of comparing apples and oranges.
- **“Keep the CIM out of my yard.”**
- No agreement that in our small market  
**‘no CIM 360°’ = ‘opportunity cost’.**

- “360° will **degrade tactical** studies”.
- Selective interest in channels from their own portfolio.
- “Any new channel = **threat for my bottomline**”  
(measuring new channels = open communicating vessels...).
- “His opportunity is my risk”.
- “We are better placed than the CIM to undertake 360° ”.
- “**The role of the CIM is to protect the above media.**”

- 2006 : '**Taskforce 360°**' = tripartite + GM CIM

Discussion on combining & enlarging media and consumption panels.  
Media agencies and media doubt feasibility. No follow-up.

- 2008 : Taskforce reanimated. Defines common objective:

**Capturing the essence  
of real life communication channel use  
by consumers.**

Towards a new decision tool  
and story telling generator  
for media, agencies and advertisers.

- 2008 : **TTT 360°** prepares study design (use, method, budget) within the framework set out by Taskforce 360°
  - **Complementary** to tactical studies
  - **More effective channel selection**
  - Allow **story telling**  
(rich descriptions of consumer media behavior allow to position communication solutions and multimedia offerings)
  - Allow **additional proprietary** typologies
  - Should **allow sectorspecific and brandspecific add-ons**  
(open architecture to facilitate integration with 3d party studies)
  - **Not** time budget, **not** CIM heavy-medium-light
  - **Forget** about an integrated panel and brand ROI



TTT 360° analyzes Belgian initiatives and discusses future.

- Agreement:
  - CIM should aim for a Media 296°  
**TouchPoints 360° > Media 296° study > PMPA 210° study.**
  - Principle of Hub, and fusion of tactical studies.
  - Measurement at the level of individual media.
  - Resulting in a multi-media database.
- No consensus on:
  - Type(s) of exploitation : strategic and/or pluritactical.
  - Access of non-subscribers to (aggregated) tactical data.
  - Keep Heavy-Medium-Light or change it.

2009 : In August the Hub project is taken over by **TC PMP**.  
The TC PMP develops a comprehensive proposal on:

- **Scope** of above and below channels.
- **Type of aggregation** of tactical data by mediumtype (time or type based...).
- **Useage examples** of the multi media database both at the level of media(sub)types and individual media.
- The different **levels of access** to the database for subscribers and non-subscribers.

- The **CIM Board refuses** this proposal in spring 2010.
  - Fears for tactical abuses.
  - Disagrees with complicated access model.
  - Lack of clarity on the use of data on below channels.
- While awaiting a political consensus, the TC PMP continues and organizes a European tender for Hub and fusion process, resulting in a ranking of institutes and proposals.

# But CIM never surrenders.

- 2010 : **Groupe Ter Musschen**

New discussions at the level of board members.



- Sort out political issues :

- exploitation limitations (strategic – pluritactical),
- levels of publication and access,
- inclusion of 'below channels' or not,
- structure and relationships of all CIM studies.

- Start in October 2010.

- October 2011 ☺ :

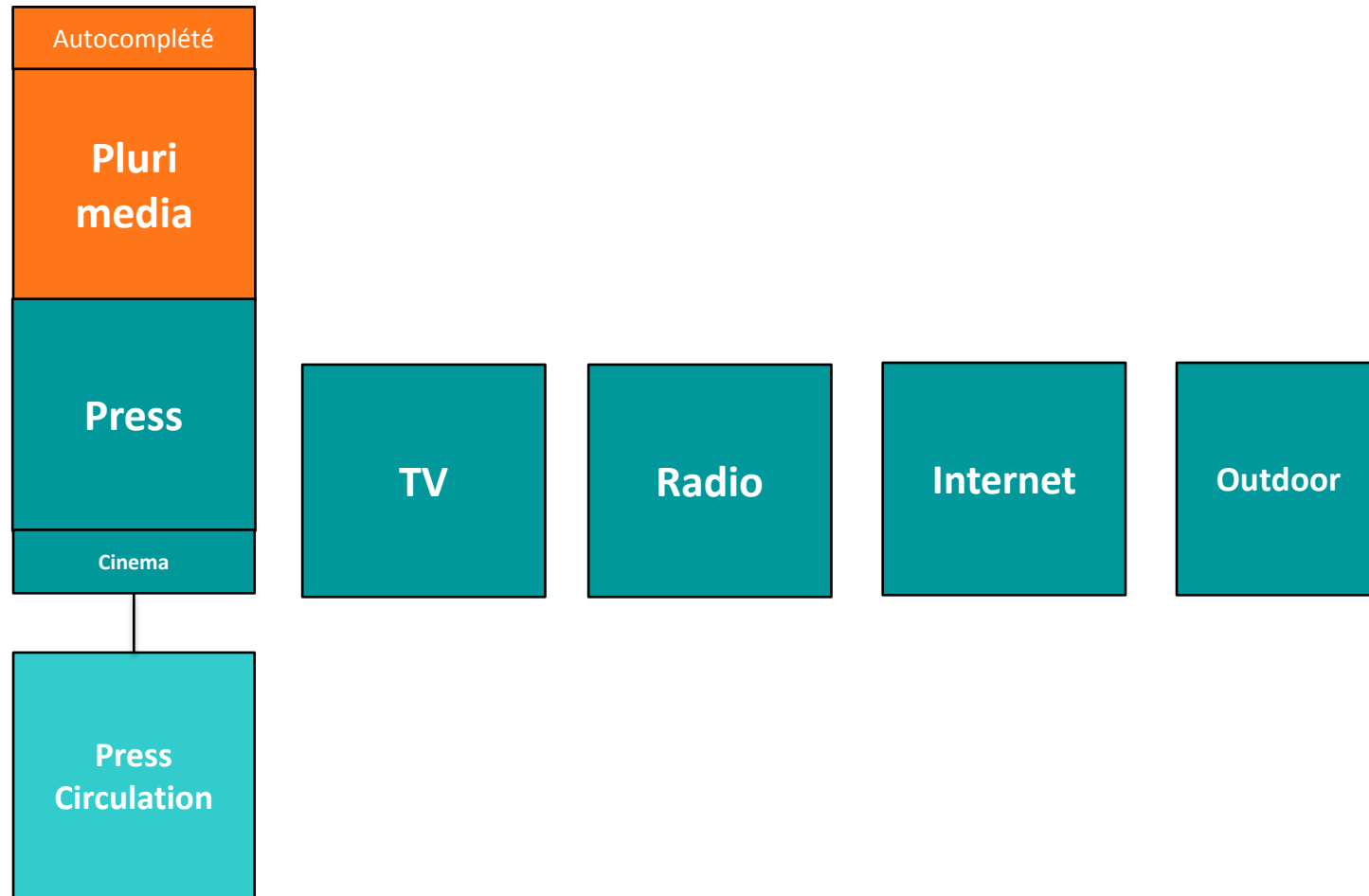


Principles approved by Board on 15/11/2011

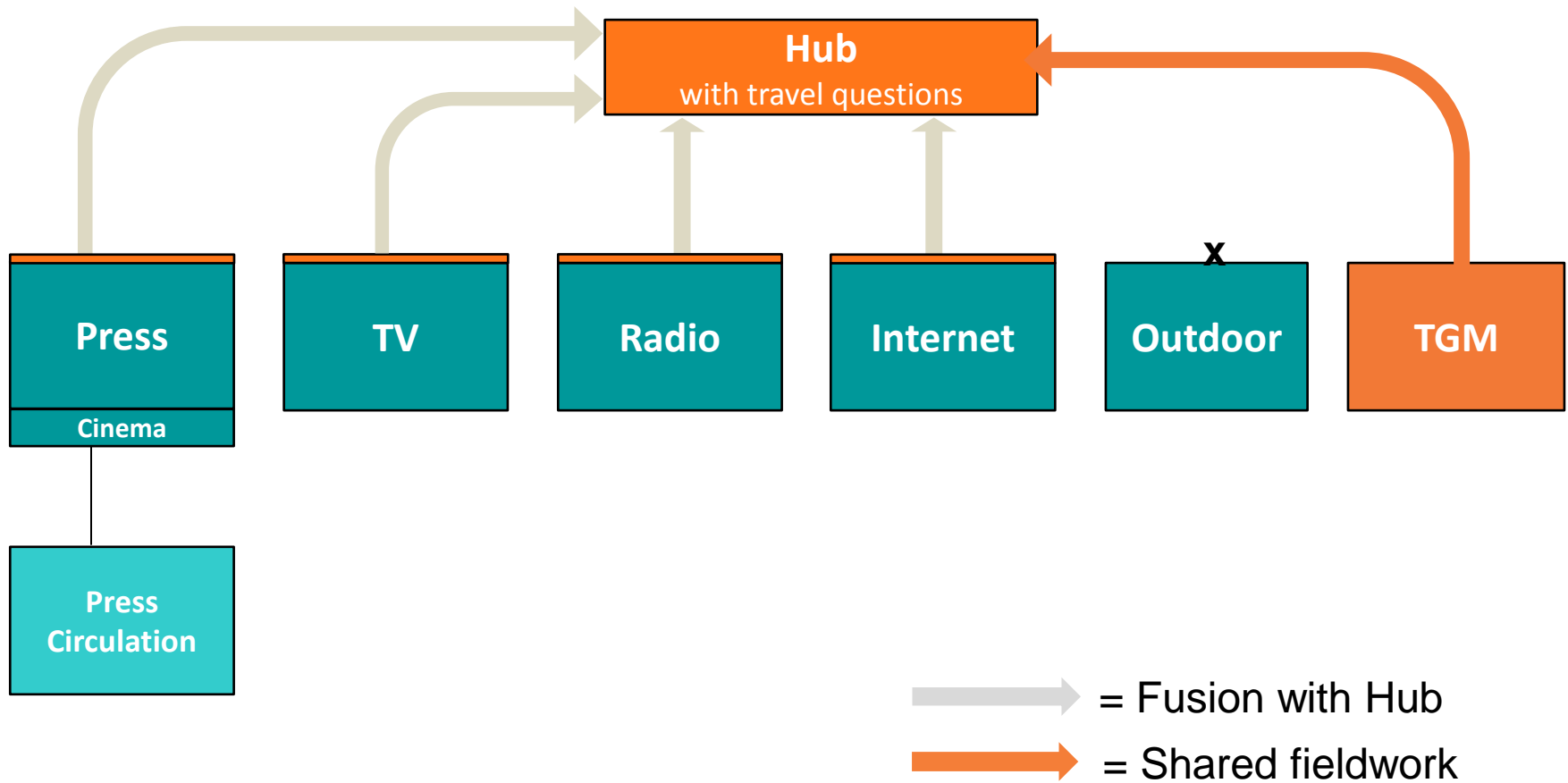


# III. Salvatio

# Current structure



# Future structure



# 1. HUB, the method.

- Relatively detailed declarative data
  - on **media** consumption **in general** (by timeband or type...),
  - **specific media when useful as hook** questions for fusion,
  - standardized **demographics**.
- Probably no attitude or product hook questions.
- All media and demographic questions in high **quality f2f**.
- Possibly **n=7.000**.
- Fusion with aggregated tactical data **(to be defined by TC's)**
- For now: travel questions in Hub and no Outdoor fusion.



# 1. HUB, data exploitation.

- **Strategic planning only !**
- Cross mediatype behavior.
- Complementarity between groups of individual media from different mediatypes (e.g. thematic TV – women's magazines)
- Identification of groups with **different consumption intensity** (3 to 5, adapted to mediatype; replaces HML)
- **No crosses between individual media.**
- **Accessible to all subscribers of any audience study.**

## 2. Target Group Monitor (TGM)

UMA requirements :

- Products and services to be **more useful**.
- Re-introduce **some brands** to allow better segmentation.
- **Enrich** attitudes.
- Add **other channels** to enrich strategies.
  - Advertising via SMS
  - In-Store advertising and price reduction
  - DM
  - Sponsoring
  - Product placement
  - Recommendations (friends/peers/neighbours & professionals, celebrities)
- **Update of demographic questions.**

## 2. Target Group Monitor (TGM)

- Position of the CIM Board :

Whatever you like, including below,

- but **exploitation at the strategic level only**
- and questionnaire **design in consensus** with media.

- Methodology :

**Probably self completion (paper or online)**  
attached to HUB study for economic reasons.

### 3. What about Press ?

**Press goes solo.**

**No more time constraints due to PMP.**

(to be continued)

## 4. Golden Standard.

- Golden Standard = Establishment Survey for sociodemographic variables and their duplications.
- Used for weighting tactical studies CIM. Used as benchmark by Febelmar members.
- If no longer Press = 10.500 then possibly

**Golden Standard will be moving average of 2 years HUB.  
(n = 14.000)**

## 5. Multi media brands.

- Need for **cumulated audiences accepted**.
- **Media-owner** is **sole responsible** for defining his brand.  
No requirements in terms of unity of content but TC's may propose limitations.
- However, audiences can only be cumulated :
  - On identical time base,
  - With mention of exact components.
- **Exploitation** in software **limited to "1 insertion"**.  
Impossible to calculate decent accumulations \* duplications in a fused database.

## 6. What about media intersections ?

New code of conduct:

- avoid fist fights and blocking between media,
- allow early indicators,
- preserve primacy of currency studies.

If measure	Base tactical	Other tactical	Management
e.g. online video	NOT in TV	YES in Internet	In agreement 2 TC's
e.g. iPad edition	YES in Press	NOT in Internet	TC base tactical (Press)
e.g. press sites	YES in Internet	YES in Press	Weight Press result to result base tactical I'Net

Board will arbitrate if necessary.

# IV. In fine



# Good plan !

- But €€€

*financing  
pending*



exit new plan



*a lot of work ahead  
for TC's and SPS*



- Even if all goes well, implementation will take time.  
Last PMP in 2012, first fusion published in 2013 ?

**Thank you**