THE CREATION OF A SINGLE SOURCE CROSS MEDIA INTERNET PANEL

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This paper describes a completely new way of measuring Internet audience behavior and combining it with a full cross media survey covering all major media categories and a full TGI database. The really good news is that with only minor changes to the original TGI survey the Orvesto Internet methodology can be used on any TGI database in the world.

THE OUTLOOK – WHY WE DO THE THINGS WE DO

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 and holistic measurement systems.

When trying to present a paper about the development of new research we always find it helpful to try to establish in what context the development has to be seen. We have in our everyday work identified a number of trends that give a background and explain why we have made the choices that will be presented.

Individualisation – Same, same but different

There is a strong trend moving towards individualisation. People nowadays seem to increasingly be clones of their peers and are for that reason not as easily defined by crude demographics as before. Even large traditional advertisers who normally have segmented their markets by basic demographics are moving towards more fine-tuned segmentation programs. The true challenge for a marketer is not only to understand what differentiates his customers but also what brings them together. It is not enough to segment people according to age and sex. The marketer also needs to understand what makes his clients, mad, sad and glad – what make them tick.

Media fragmentation

The second trend is the much-discussed phenomena of increasing media fragmentation. Once again technology is a driving force – the price to put new media to market has decreased significantly and has made even the most obscure of targets reachable by highly niche media. The mass media are in a steady downward spiral while niche media are growing rapidly. We are moving from broadcast towards narrowcast.

More choices but less time to choose

Technology, amongst other things, has also contributed to a major shift in power from the marketer to the consumer. Any consumer can, with a minimum of effort, get more information than many of the

sales people they meet in store can provide. Price agents and consumer chat rooms are potential nightmares to any marketer who does not provide what he promised.

But this poses another dilemma because when asking Europeans what resource they wish they had more of – the chances are that they will tell you that what they really want is more time. In this time of information overload more information is, generally speaking, not on the wish list.

So the consumer's paradox is that he will have more choice but less time to choose. Even if the consumer's power has increased, his true limitation is the only truly limited resource – time. Consumers need help to choose. Chances are that they will turn their trust to someone they think will make the most sensible choice for them. This is why brands and the building of strong trusted brands will become even more significant than before.

Advertisers turn up the volume – Consumers tune out

In a world of increased clutter where advertisers are competing against each other with products that are increasingly 'look alike', the only way for an advertiser to get heard is to shout louder. The dilemma is that the higher the advertiser turns up the 'volume', the more likely the consumer will avoid the advertising. This of course forces advertisers to shout even louder.

Today advertising avoidance is reaching levels where it is becoming a serious obstacle for mass communication of commercial messages. The latest contributor to this trend is the digital video recorder, which is fundamentally changing the rules of the marketing game for anyone involved in TV advertising. In Sweden, which is a relatively uncluttered environment, 57% of the population claim that they do not "like" TV advertising, and 12% of the households refuse to accept direct mail and so on.

Advertising avoidance correlates strongly with the first trend about individualisation because clearly relevance is the best medicine to avoid consumers tuning out. Thus targeting to well specified groups are exactly what the marketing doctor orders.

Integrated communication – Mixed media

All these phenomena are leading us to the same conclusion. In a world where consumers are in power and they are actively avoiding your advertising and at the same time have more choice than ever before, you have to become a trusted brand.

However, it also means that advertisers will meet consumers in more places than ever and in new situations and environments – this all calls for integrated communication – the whole company choir needs to be singing in the same key. In the narrowcast world, cross media planning will be essential to any planner because if nothing else it will be a necessity to combine more small media to reach the same results as they used to do in the 'broadcast' world.

The need for an understanding of ROI

Also forcing integration and mixed media planning forward is an internal pressure faced by all marketers nowadays. Pressure from their Management Boards is quite rightly putting them in a tough spot to explain exactly what their budgets are being spent on, and how synergies and combinations of media work for the brand and how this affects the bottom line. In Sweden the latest proof of this trend is a new training programme from the Stockholm School of Economics and the Advertising Association. The object is to get marketers to look at advertising from a strategic business perspective and to speak the same language as their CEOs.

INTERNET AS AN ADVERTISEMENT VEHICLE

New technology development such as the broadband explosion has resulted in a world of consumers who are always 'connected'. New search technologies have made the web universe easier to navigate and more manageable than before and which provide 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 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 is now a serious contender for the major media advertising budgets.

Currently more than 10% of the total ad spend in Sweden is placed on the Internet, accordingly the focus now will be 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 the ones the advertiser wants to influence from a brand building perspective.

In a perfect world the advertiser's own carefully chosen segmentation can be perfectly reflected in the media planning 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 the advertiser needs a universe that is defined the same way as for other media – consequently it needs to reflect the total population and not only the Internet population.

A future in isolation – direct response focus

Unfortunately there also seem 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.

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 the medium is not getting its 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 advertised products pricing, 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 leads to the desired response.

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

Alas and unfortunately an orthodox direct response approach to the Internet will condemn the Internet and its actors to a world in isolation separated from the rest of the media world.

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 off line editions of their media.

It has also led to a situation where on and off line 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 big picture

Criticism of agencies by media suppliers, in this case the Internet providers, is not a new phenomena – it seems to happen every time a "new" medium emerges and in the authors' opinion, it is very rarely the solution to declare agencies to be rigid and old fashioned. What we need to understand is the complex buying process of an agency, as they are trying to get all the pieces of the media jigsaw put together.

In summary, it just does not make sense to look at the Internet in isolation from other media – neither from media house perspective nor from the advertisers' point of view. If brands are to be built on the Internet, and they are, then Internet needs to be comparable with other media.

The solution – The best of both worlds

Unfortunately some seem to look at reach and frequency models, with the comparability that goes with them, as

Figure 1

standing in the way of the development of even more advanced site centric direct response optimisation tools.

Nothing could be more wrong.

The way we see it, the 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 – STRUCTURE AND COMPONENTS

It is now time to describe the concept in detail. In Sweden there already exists a working single source survey called ORVESTO Consumer, covering all the major media (television, radio, direct mail, print, cinema). That is the starting point of the whole concept described below.
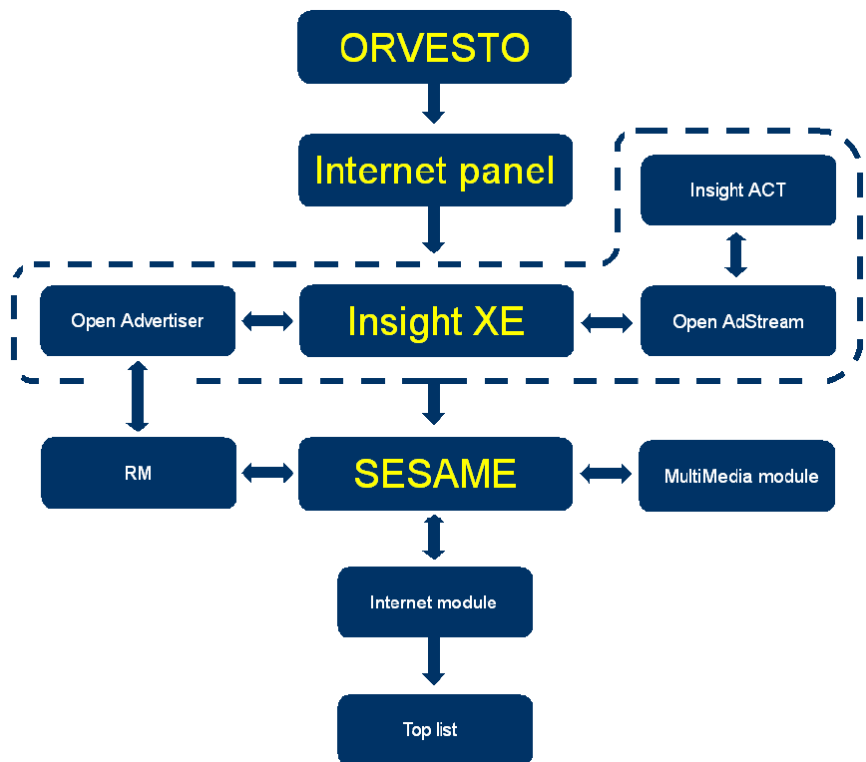
The second thing needed is a panel whose activities on the Internet can be monitored and used to draw conclusions about the population and universe. The third important building block is a way to monitor the behaviour of the panel. In this respect we use the cookie-based traffic measurement InsightXE. And finally we need a platform for analysis that contains not just Internet data, but data about all other media. This is Sesame.

Described schematically (see figure above) the postal survey Orvesto Consumer with a yearly sample of 50,000 respondents is used to recruit the 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 technically and so forth.

These basic traffic measurement figures 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 –
THE 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. And via a repeat interview with the same informants the database made available to the market also contains reach and frequency data for radio and television.

Some 50,000 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 visiting 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 differ from each other. That is why the postal data is now replaced by the electronic measurement of a panel.

The user centric Internet panel

The panel used for the Internet measurement described in this paper is recruited from those Orvesto respondents who 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 '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.

It should be said that the panel representation of the universe 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 technical measurement stands and falls, however, with the proper representation of the universe, which is not just of the sample of individual panel members, but also of the computers they use for Internet access.

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 to 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 would 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 following 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 claimed to use in our initial survey questionnaire, 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 panel behaviour. 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 technical and editorial departments of clients, insights about the visitors' behaviour – in that sense InsightXE is a content management system; and 2) give the marketing 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 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 respondent identification number, we are able to use the InsightXE data capturing to monitor the surf patterns of a statistical sample (the panel) about which we know a lot of other things.

Banner Measurements and Direct Response 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 in 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 on the sold out section. This concept is called InsightACT.

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

The Sesame multimedia planning platform

True cross media planning can really only become a practical reality when all data at the individual informant level are accessible in one database and linked to multi-mediaplanning software that is accepted by all actors in the market place.

Since Sesame is already being used by all media categories in Sweden it was an obvious choice to add yet another media to the portfolio. 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 media 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 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 multi-media analysis possible between Internet and other media on the currency level (the most recent 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 capturing 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 the

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 ones more what are the most important building blocks.

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), 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 Internet, due to the synergic role it often plays in broad-spectrum campaigns, not only has to be measured in a comparable way, but 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 an 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.

To make the Internet OTS comparable to other media

To make cross media comparisons the planner always needs to consider what value

Figure 2

or weight he should apply to OTS from the 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 value/weights that reflect the probability of 'open eyes and/or ears in front of the advertising'.

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 sensible judgements, with or without the research, to confirm our judgements on what the likelihood of exposure is, not only to the medium, but also to the advertisement within it 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.

Response curves

The four main factors that a planner needs to consider when building a response curve is firstly the force of the advertising. The force is both dependent on the creative treatment and the impact of the media (how many senses do the media use, in what mood is the consumer, etc). The second factor is the synergies between different media. The third factor, which is closely correlated to synergies, is the question of timing of exposure to the advertising. Synergies can

only occur if the exposures take place in a time frame in which the consumer is able to "remember" the last exposure.

The fourth and without doubt the most important factor is relevance to the advertisement. The planner can achieve relevance (selective perception) through environmental and/or individual targeting. In our opinion it is crucial to stress the point that any planning tool that does not contain a rich source of target group data simply will not be acceptable to use in planning in the near future.

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 into 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 the publication during the most recent publication interval of the title. 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
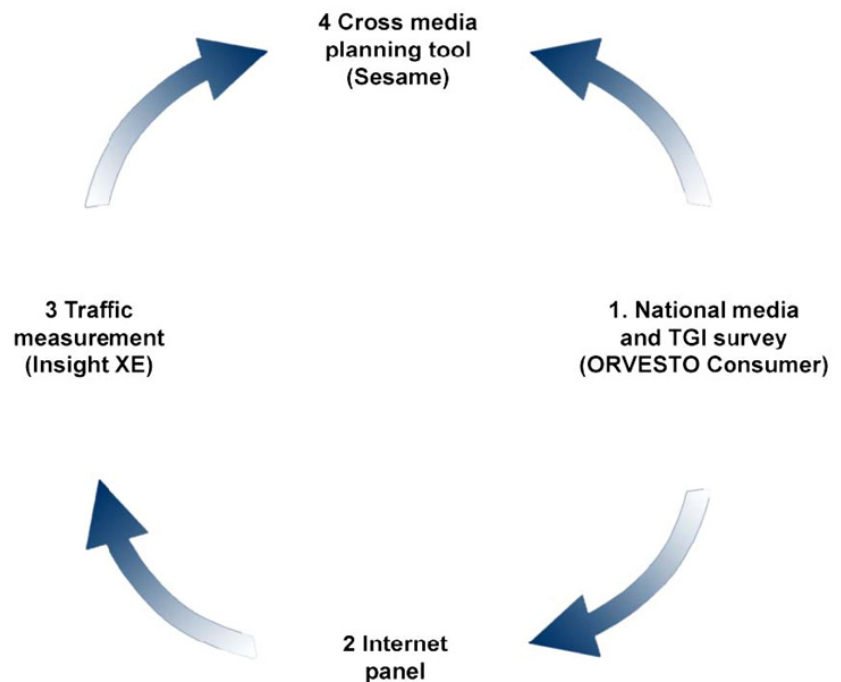
way would give us higher figures than TV, because the advertisements are there more or less permanently and not just for 30 seconds every now and again. On the other hand, using the print definition we would end up with a theoretical maximum number of OTS equalling one per day, regardless if the audience have the habit of visiting the site once in the morning and once 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 most 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 think is needed to note a particular advertisement. If for example the banner is situated below scroll one might want to increase the time spent that is required.

THE ADVANTAGES OF RICH 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 greater 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 Orversto 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 log electronically what people do whether they want it or not. 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 estimate 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 technically make sure the cookie is regularly refreshed. But in contrast with site centric measurement these aspects can be kept under control and therefore, as a 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 panelist'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. 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 people, 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 cases where we know a person uses more computers than he or she has 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 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. 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.

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 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; 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 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 are that with only minor changes to the original TGI survey the Orvesto Internet methodology can be used on any TGI database in the world