

# ARBITRON'S STAR TREK ADVENTURE

**Building an Outdoor ratings service is the research equivalent of putting a man in space.**

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Ambition in the elderly is against God's game plan, but Outdoor, arguably the world's oldest form of advertising is just that eccentric.

Witness its rapid consolidation at national sellers like Clear Channel and Viacom, who smell opportunity.

Check out its remarkable creative renaissance at agencies, who love that larger than life-size blank sheet of paper.



Look at those recession dollars, where Outdoor alone came close to holding revenues.

But the missing piece for Outdoor has always been believable data on who actually sees the messages and how often.

In June Arbitron announced a research program to develop valid Outdoor ratings and for the first time sellers seem willing to pay the price. The full monte includes *demos*, *reach/frequency* and *audience accumulation*

*over time* for major US markets. These are now cooked-up formula estimates based on traffic counts, cupidity and imagination.

### **Pieces of the Outdoor puzzle**

Reporting Outdoor ratings requires three things: Area population, distribution of Outdoor displays and consumer travel patterns. Travel links consumers to displays and provides the basis for estimating Outdoor exposures and reach and frequency. But it's more complicated than that.

The travel data can be either site-centric or consumer-centric. And it can be by car or on foot.

Site-centric measures start with the location of the Outdoor displays and count the passing people. These are traditional traffic counts.

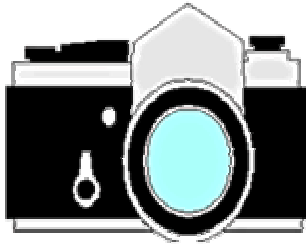
Consumer-centric measures start with a sample of people and count the passing Outdoor displays. There are no examples of consumer-centric Outdoor measurement in the US, because nobody measures Outdoor. They collect miles driven or some other rough indicator of the *probability* of Outdoor exposure.

### **Site-Centric Measures**

Traffic counts report gross *potential* exposures delivered by display locations, by estimating the number of people in the passing cars. They are used for site selection, packaging and pricing.

Traffic counts significantly overstate the probability of people seeing the Outdoor display, so agencies typically deep-discount those numbers when they are included in a plan. And that is not their only limitation.

If we placed a camera on an Outdoor board and counted the number of people whose eyes we can see in the photos (as Alfred Politz did in 1959),



we would have an excellent site-centric count of people exposed. But it still would not tell us how many different people are reached, how often, or who they are. For that you need to research a sample of consumers.

That is Arbitron's challenge. To develop a consumer survey technique to measure Outdoor exposures. The additional problems are the data produced need to be comparable to those we use for other media and the technique needs to be affordable in the top 50 markets.

### **No ad carrier called "Outdoor"**

Comparability is difficult because Outdoor is different. It's not like TV, which has programs carrying commercials, or magazines, which have editorial surrounding ads. There is no ad carrier called "Outdoor." There is only the ad.

So an Outdoor exposure is an ad exposure, while a TV or Print exposure is an "opportunity to see" an ad. That means comparing a *bona fide* Outdoor exposure to a TV program average quarter-hour exposure is unfair to Outdoor.



An ingenious solution is to define *the street where the Outdoor board is located* as the carrier, much like the TV program, and *present in the street* as the measure of Outdoor exposure. This is a more inclusive definition. In the street encompasses a large area, so the probability of the average "in the street" driver seeing the Outdoor message is most likely lower than

the probability of the "average program viewer" seeing the commercial, or for that matter, the "average issue reader" seeing the ad.

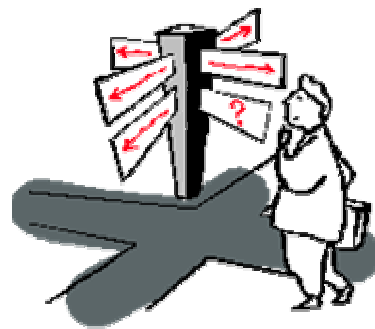
Then there is the exposure interval question. Outdoor ads are exposed repeatedly as people circulate through an area. Should multiple exposures within a day, for example going to and coming from work, be counted as two exposures, as they in Television and Radio, or as a single exposure as they are in Print?

### **No commonly used technique**

Once we're past the problems of defining exposure, we find there is no standard way to measure it. Nielsen has recently made a metered-measurement proposal to the Outdoor Industry, but a meter panel seems far too expensive for market-by-market reporting. The local Peoplemeter program is mired in Boston because of its cost.

Perhaps the Arbitron PPM panel, with costs shared by TV and Radio might be affordable down the road. But for now meters appear the stuff of a validation technique rather than a ratings service.

A recall study of Outdoor exposure would cost far less, but it would report the wrong thing. *Remembering seeing an Outdoor* display measures ad awareness, which is not the same as exposure and a much smaller number. In TV, one viewer in six recalls the average commercial.



But this doesn't mean we can't devise a valid way of measuring Outdoors' audience. The trick is finding a good surrogate for outdoor expo-

sure that can be measured. It will certainly be based on a respondent's daily commuting, shopping and travel patterns related to the location of Outdoor sites.

That's Arbitron's Star Trek adventure. To go where no research company has gone before. And where several want to get to now.

- September 1, 2002 -