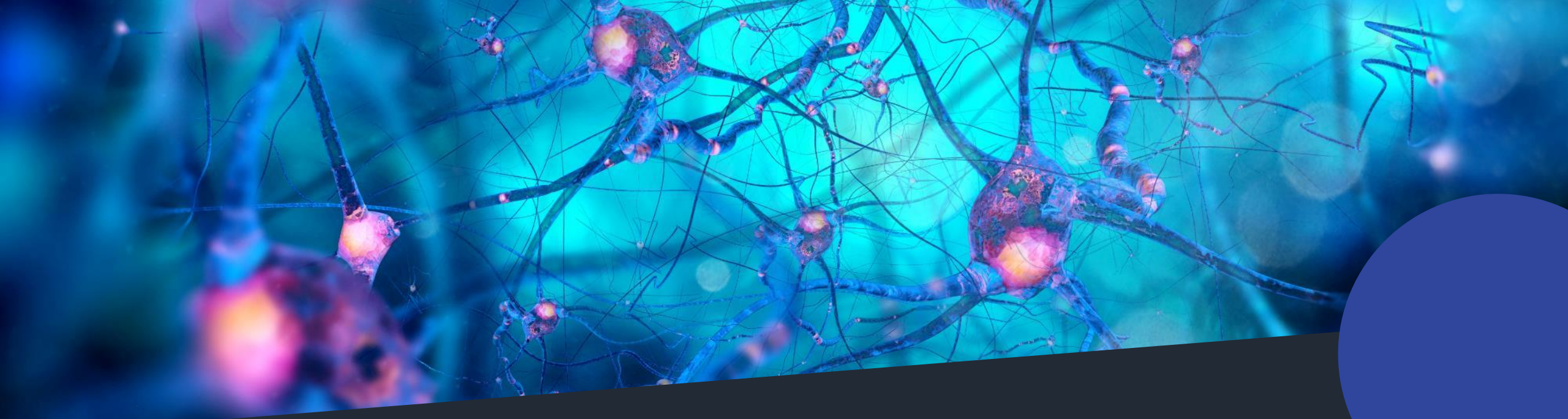Ipsos SERBIA

OMEX project

OUTDOOR MEDIA EXPOSURE

INTRODUCTION

The Audience Measurement Service Line provides estimates of the number and profile of people exposed to media and advertising content through watching, listening to, reading or seeing it in the media. We offer distinct measurement solutions which cover: Viewing (TV/video), Listening (radio/audio), Reading, Out of Home and Cross-Platform/Digital media. We also monitor and report on advertising activity (Adex) in many countries as well as offering expertise in data science for audience measurement.

PЯRADEX

PRRAdex is continuous measurement project of size and structure for print and radio auditorium.

PRRAdex is Ipsos official tool that has been used in 19 countries worldwide with different names, and which is based on following components:

*Sample on a monthly level (cca. 1500 respondents) is in category of national representative sample. Representativity is on a level for gender, years, region and type (urban, rural)

** For CATI it is used RDD (random digit dialer) that enables connecting fix and mobile users by random (software) generated subscriber numbers, which are in advance defined.

SINGLE SOURCE CROSS MEDIA MEASUREMENT

One person reports on his media consumptions (print & radio)

Daily data collecting (daily sample of 150 respondents, 12+*)

CATI** methodology (telephone survey), technique day-after-recall

AUDEINCE DATA

ADEX

Daily marking on advertisements in print (daily and periodical) and on radio

Marked are all parameters of advertising: brand, advertiser, class, category, ad size, copy, position, investment estimate

For print entering data is manual, while for the radio it is used automatized audio fingerprint

ADEX DATA

Realizing the market needs for continued (daily) data about the auditorium characteristics in the region, Ipsos in 2021 has improved its project for a regular measurement of radio and print auditorium and advertising under the name PЯRAadex

PЯRADEX | ANALYTICAL SOFTWARE

Collecting data on media auditorium and advertising are placed in PRRAdex software, that his users (media buying agencies, media and advertisers) enables different types of analyzes

AIR **RTG**	daily readership of chosen printed issues (rating)		**SHR**	Participation of chosen print issues or radio stations in total auditorium
AMR	listening of radio programs by minute		**Max** **RCH**	Maximal reach of media on two weekly basis)
RCH	local radio rich on daily and weekly basis		**ATS**	Average time spent with a radio program

READERS/LISTENERS PROFILE
Socio – demographic profile of print and audio media consumers
(data can be generated daily profile for both media or on a weekly basis profiles)

ADEX DATA**

Insertations	Number of ads
Expanditures	Value /investment
Share of Insertations/Expenditures	Participation in the total number or value/ investment

POSTEVALUATION**

GRP **TRP**	Gross/Target Rating Point Rating (AIR/RTG) x number of airings		**CPP**	Cost Per Point Media cost / GRP
Eq **GRP**	GRP that includes calculation and ad size		**SOV**	Share of Voice

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OMEX

OUTDOOR MEDIA EXPOSURE

PARADEX | Ipsos

INTRODUCTION

OMEX is a specialized Ipsos AUM tool for measuring Outdoor Audience in the Balkan region. Development of this tool started in 2014. when Ipsos was contracted by the largest OOH provider in Serbia (Alma Quattro) to estimate visibility (OTS) of the local outdoor network (in the capital city of Serbia - Belgrade and of Vojvodina - Novi Sad).

The first Outdoor Audience Measurement used the traditional data collection method (PAPI), but during the project life (additional waves conducted in 2017. and 2021.), Ipsos implemented (partly in 2017. and fully in 2021.) passive data collection in line with high penetration of ICT in Serbia and modern trends in the research industry.

Today Ipsos can offer to its clients a completely passive technique of data collection or Mix Mode (combination of passive and traditional methods) for gathering data about typical daily routes.

HISTORY

YEAR	METHODOLOGY	SAMPLE SIZE	DC SW	USER APP.
2014.	PAPI Diary 100%	1200	none	CBS
2017.	PAPI Diary 50% Pasive Google maps Diary 50%	1500	none	CBS
2021.	Pasive 85% PAPI Diary 15%	2000	Ipsos SM app. Šetko	MediaAppConsulting

METHODOLOGY

For the needs of monitoring daily routes of specific populations (potential OOH audience), Ipsos R&D team has developed our proprietary mobile app Ipsos Šetko (Walker), approved by Google Play and Apple Store, global web browsers and mobile apps providers.

Basically, this app uses similar principle as Google Maps, and generates (using GPS) KML files with extremely precise daily routes coordinates. Given the nature of information collected by this mobile app, the entire process of installing, downloading and using the collected data strictly adheres to GDPR, which actually enabled approval and acceptance of the app by two biggest global web browsers.

Since the app works in the background, it actually doesn't spend much of handset's resources and it doesn't use wi-fi, which is valuable for participants and facilitates the entire data collection process.

Participants have ben selected and recruited in two ways:

- through Ipsos Web panel and
- by using push-to-web technique, which means that participants are recruited using standard, random-walk selection and CAPI method of collecting basic demographic indicators.

METHODOLOGY

Data collection is only one part of the process of generating OOH audience measurement data. The key element of the final output is weighting, which has two stages:

1. socio-demographic data weighting, or statistical adjusting of the key sample characteristics (age, gender, type of settlement) to the target population characteristics (universe), or, in this case, characteristics of residents of a region, city or broader geographic territory

2. metric data weighting, or mathematical calculation of probability that a specific ad unit might be seen (OTS) in terms of the following media attributes which define VAC (Visibility Adjusted Contac):

Speed	< 10 km/h (pedestrians)	= 10 km/h (possible traffic jam)	>= 10 km/h (normal traffic speed)
Angle	Frontal	Mixed	Parallel
Distance	Visible from far to near	Visible from far	Visible from near
Height of media	0 m	< 3 m	>= 3 m
Complexity of surroundings	None	Marginal	High
Scroller (or Digital)	1 visual	2 visuals	3 or more visuals
Eccentricity (position of media)			
Size of media (proportionate to Distance)			

Only after applying these two additional statistical-mathematical adjustments to raw data, they are ready to be imported to Ipsos OMEX analytical software that enables interactive calculation of all standard metric indicators of an audience.

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OMEX

METRIX

Ipsos OMEX analytical software that serves as a platform for data processing and reporting about size and structure of OOH audience is a part of a broader Ipsos media audience measuring system PRRADEX (which includes radio audience, print audience, OOH audience measuring).

This highly user-friendly software enables users to easily and simply obtain reports about size (daily RCH, max RCH) and socio-demographic structure of OOH audience by selecting specific, predefined criteria (geographic location of ad units, size of ad units, type of ad units) or their combination (demographic characteristics of TG).

If combined with AdEx data (the software has AdEx module for each media class), and in cooperation with data users (OOH providers), it's possible to generate also other, standardized metric indicators of OOH campaigns (GRP, Investment, Insertions, SHR GRP, Eq GRP...) by various, predefined parameters (Brand, Advertiser, Sector, Class, Category...)

OTS - Opportunity to See indicates how often, on average, a person has come into contact with a certain advertising medium. The OTS value serves to determine average contacts between the advertising media and the recipient. The OPS can be calculated as follows: The net reach is the number of persons reached once. The gross reach is the number of persons reached regardless of the number of times the ad has been shown. The OTS value is obtained by dividing the gross reach by the net reach (GRP / RCH)

RCH – Reach / % of universe (total population) being exposed to medium in a specific (longer) period of time (usually week or month). Reach is based on counting each specific (different) individual which used some medium et least once in specific period of time.

GRP - Gross Rating Point (GRP) measures impact. Gross rating points are a measure of the impact by a campaign using a specific medium or schedule. It quantifies impressions (GRP as a number) can be presented also as percentage of the target population, multiplied by frequency. This percentage may be greater, or in fact much greater, than 100.

CPP - Cost per Point (CPP) is a measure of cost efficiency which enables you to compare the cost of an advertisement or campaign schedule to other advertisements (for example, TV, versus radio, or versus out-of-home (OOH) or billboard advertising). CPP is calculated as Media Cost divided by Gross Rating Points. The Cost per point (CPP) is the cost of advertising exposure opportunities that equals one rating point or one (1%) of the population in any geographically defined market. Also known as Cost Per Gross Rating.

CPT - Cost per mille (also known as "CPM", also known as "Cost per thousand impressions") describes how much it will cost to deliver one thousand impressions from advertisers who see the advertising on displays in a market. CPM is calculated by dividing the total cost of an advertising campaign by (total number of impressions/1000). For example, assume an outdoor advertising campaign cost $10,000 and it delivered total Impressions = 5,000,000; the calculation for CPM would be $10,000/(5,000,000/1000) = $2 CPM

Exposition/Day (Week)/Face: Number of Insertations on a specific number of faces (included in campaign) within selected time frame (day or week).

PEDESTRIANS

TRAFIC COUNTING

INTRODUCTION

Counting traffic is one of the standard approaches in OOH market researches. This kind of counting is conducted once in 3 to 5 years, given that population movement routes and patterns are usually not changed much in shorter time intervals. However, accelerated urbanization of big cities and development of their traffic infrastructure may require somewhat more frequent, or even continuous, measuring.

In addition to development of the very traffic infrastructure, frequency and tempo of conducting such researches are also influenced by the technological development of OOH industry, or expansion, growing complexity and technological enhancement of OOH advertising network.

The fact that Knez Mihailova street area, as the central and the biggest pedestrian zone of Belgrade, has never been subjected to this kind of research, as well as that rich network of LED displays and advertising panels has been set up in this area over the recent years, seem to be enough of a reason for the company Alma Quattro to initiate realization of this research.

The key goal of the research was precise assessment of the total number of pedestrians in this location as the potential auditorium for OOH advertising formats set up in Knez Mihailova street area.

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METHODOLOGY

Pedestrian count in the area of Knez Mihailova street was conducted from September 04. to September 12, 2021. The used method was standard and traditional: recording behavior by systematic observation.

Ipsos interviewer network was engaged on this project task.

The research plan defined total of 17 entry points (streets) for recording of pedestrian traffic. Entry points are the streets that pedestrians use to access Knez Mihailova pedestrian zone.

This pedestrian count took 5 workdays and 4 weekend days, in line with ESOMAR standard traffic count approach. Pedestrian count was performed in 15-minute intervals, in the period from 08.00 to 23.00 hours (total of 60 15-minute intervals per entry point). During five workdays, pedestrian traffic in all 60 15-minute intervals was recorded only once for each entry point in the defined traffic count range. Same principle was used also during the 4 weekend days.

The pedestrian count was performed with a CAPI device, with which interviewers also recorded pedestrians' gender, based on physical (external) characteristics.

At each entry point, interviewers had their back turned towards Knez Mihailova street, registering only pedestrians entering Knez Mihailova street or heading in its direction.
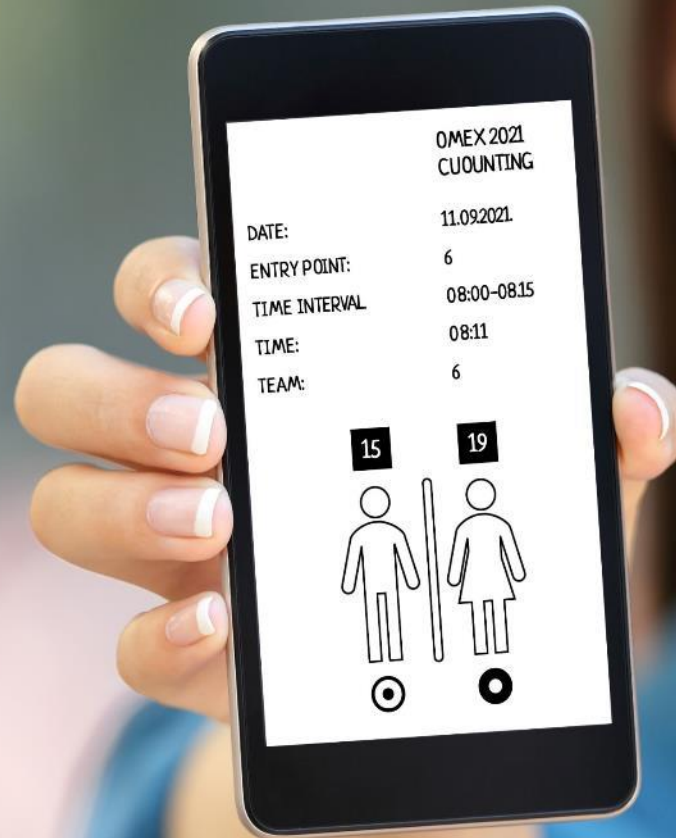
TRAFIC COUNTING

Due to the needs of further analyses of the characteristics of OOH auditorium in the area of Knez Mihailova street, the area was divided into two zones: ZONE 1 with 5 entry points, and ZONE 2 with the remaining 12 entry points (map and overview of all entry points on the slides to follow).
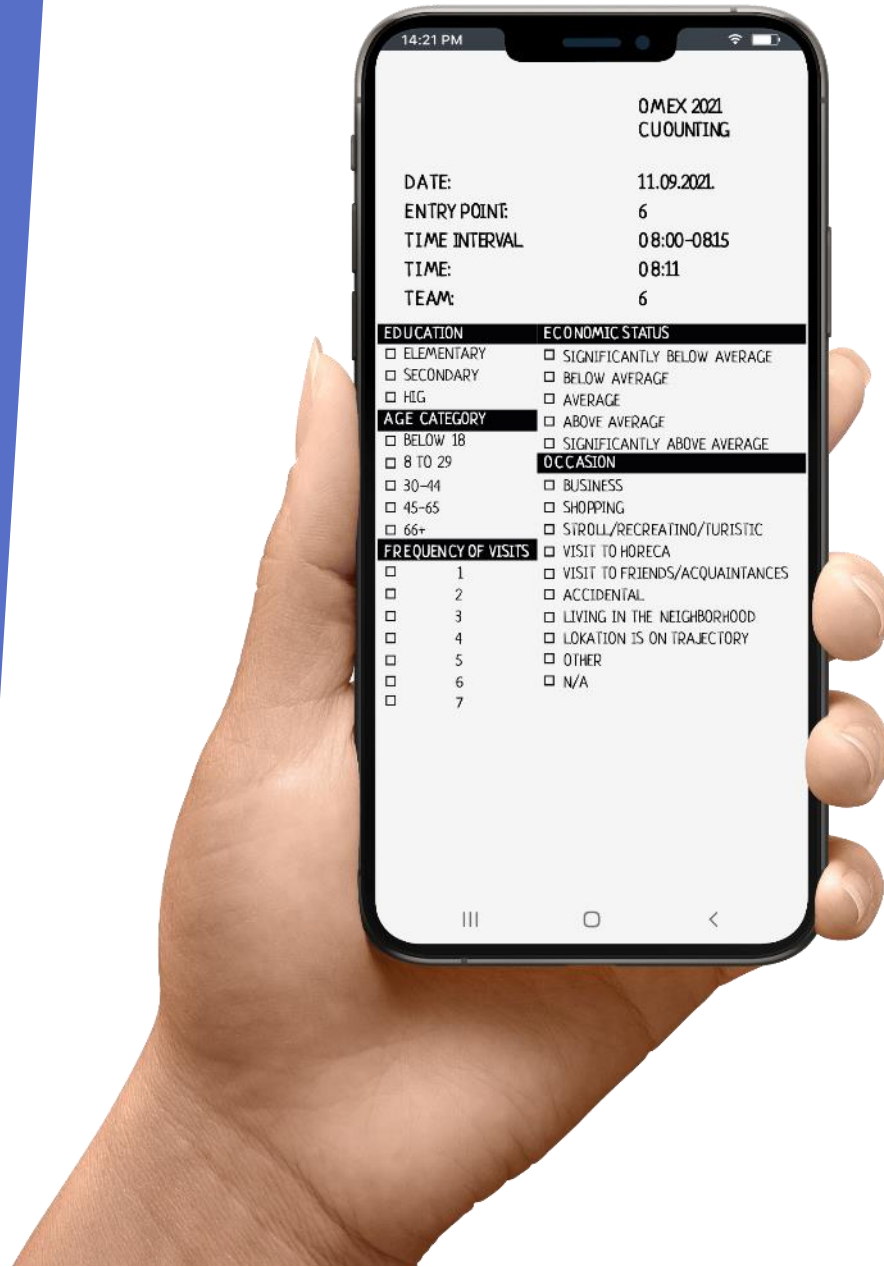
In order to provide information about other socio-demographic characteristics of potential OOH auditorium, one pedestrian per 15-minute interval was interviewed, selected randomly (statistical step). This brief interview covered the following indicators.

- Education
- Economic status (self-assessment)
- Age (within the offered categories)
- Reason for visiting the area
- Frequency (in days) of visits to the area in the past 7 days
- Current residence of pedestrian

Data about pedestrian count in the area of Knez Mihailova street within the two defined zones, are presented in the slides to follow as average (daily) values, as well as estimates of total 7-day traffic.

ENTRY POINTS

WHOLE TERRITORY OF KNEZ MIHAILOVA

ZONE 1	Entry point 1:	Palace Albania
	Entry point 2:	Obilicev Venac Str.
	Entry point 3:	Republic Square
	Entry point 4:	Zmaj Jovina Str. (Progress Gallery)
	Entry point 5:	Zmaj Jovina Str. (Vasina Str. direction)
ZONE 2	Entry point 6:	Djure Jaksica Str.
	Entry point 7:	Academic Square (Cika Ljubina Str. direction)
	Entry point 8:	Vuka Karadzica Str. (Obilicev Venac direction)
	Entry point 9:	Vuka Karadzica Str. (Vasina Str. direction)
	Entry point 10:	1300 Kaplara Str.
	Entry point 11:	Uskocka Str.
	Entry point 12:	Nikole Spasica Str.
	Entry point 13:	Kralja Petra Str. (Obilicev Venac direction)
	Entry point 14:	Kralja Petra Str. (Vasina Str. Direction)
	Entry point 15:	Rajiceva Str.
	Entry point 16:	Pariska Str. (parking lot)
	Entry point 17:	Uzun Mirkova Str. (Ethnographic Museum)
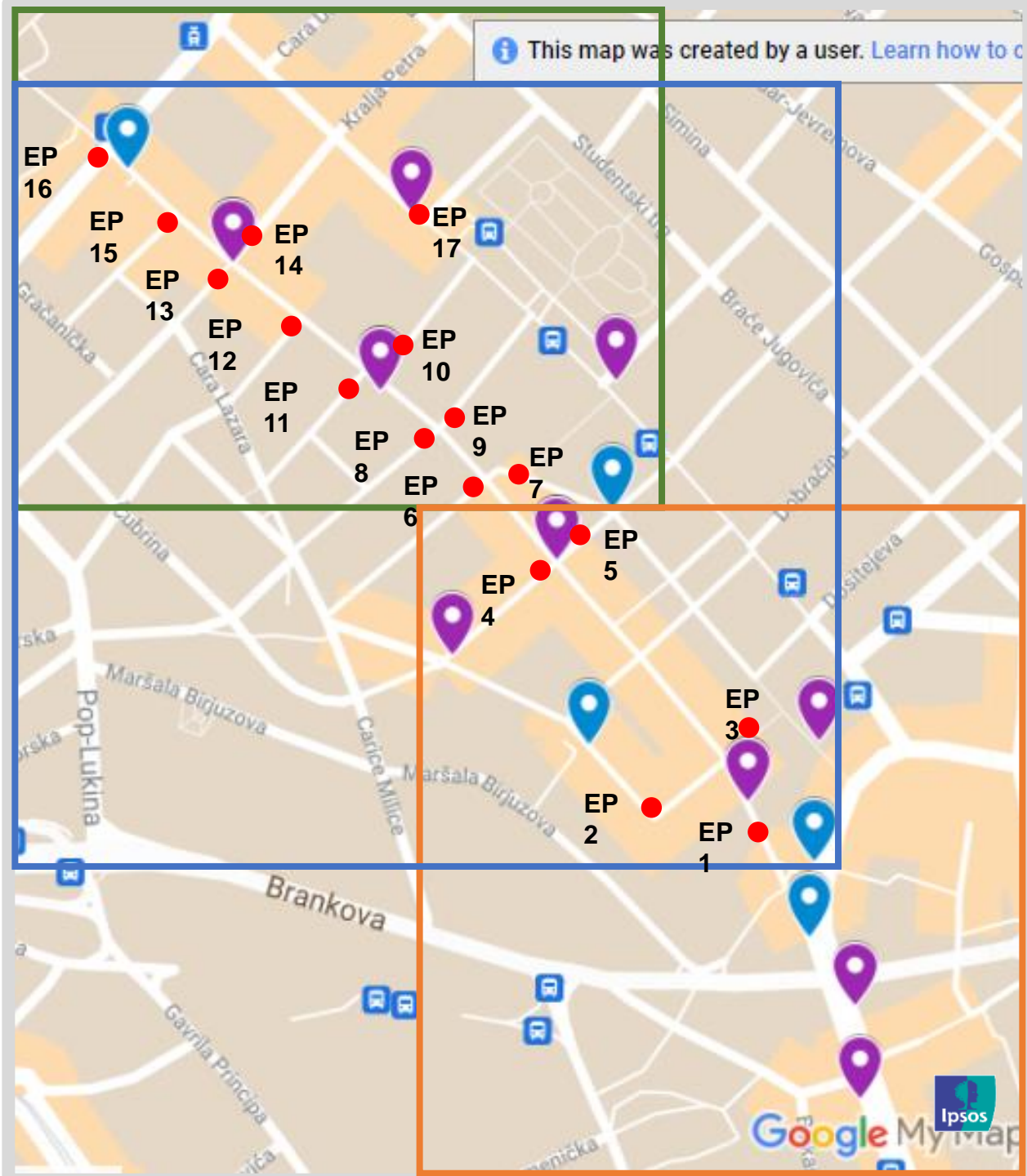
RESULTS
SUMMARY

SUMMARY

In a typical week, between **08h** and **23h**. the area of Knez Mihailova street is visited by more than

520.000 people

Average **daily number of visitors** (average for all 7 days period)

75.000

Knez Mihailova street has **most visitors during workdays** in the period between

16h and 17h

2/3 of visitors are between **18** and **44** years old

53% of visitors are **women**

9 OF 10 VISITORS LIVE IN CENTRAL CITY MUNICIPALITIES

Municipality	Value
Stari Grad	21
Palilula	11
Novi Beograd	9
Voždovac	9
Zvezdara	9
Savski Venac	7
Vračar	7
Zemun	7
Čukarica	6
Rakovica	4

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RTB

RETAILER, MAJ 2022.

Medij	Insertations	Insvestmen	GRP%	CGRP
Radio	794	5,796,556	502.3	11,540.26
OOH	453	5,973,382	2,882.1	2,072.58
Print	21	4,217,599	46.4	90,896.53
TV	18,832	814,020,180	12,047.0	67,570.36

MOBILNI OPERATER, APRIL 2022.

Medij	Insertacija	Investment	GRP%	CGRP
Radio	1,002	7,251,888.76	644.1	11,258.95
OOH	35	2,355,110.08	533.5	4,414.45
Print	1	147,000.00	0.8	183,750.00
TV	9,672	350,345,103	5,087.0	68,870.67

THANK YOU