

Audience measurement for out of home media

Request for Proposal





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Statement of purpose



This request for proposal is to identify and select potential companies interested in tendering for the next contract for the Route out of home (OOH) audience measurement system, which is expected to come into effect from April 2025, for a minimum period of five years.

This document constitutes an outline brief of the services required. This document should not be taken as a definitive service specification but rather as a description of Route's requirements, together with some parameters that Route believe must be adhered to.

A list of key questions and more detailed principles are listed in this document following background to Route, and these should guide the responses.

It should be noted that the RFP scope is not exhaustive, and it should be expected that requirements through the course of a prospective may change contract.

In brief, responses are invited for any or all of the following sections of the contract, **numbered below**:

- 1. Data collection and collation innovation in methodology and sources
- 2. Data modelling managing and integrating bespoke and exisiting sources
- 3. Data processing speed, adaptability, and flexibility
- 4. Data access for planning
 - Provision of a **participant level database** (key for planning **OOH**, storytelling and insights about people's out of home journey behaviour).
 - A dashboard that allows a view of the audience journey data at a topline level
- **5.** A single API, with flexibility to provide different levels of access for underwriters and subscribers
- **6. Campaign planning and optimisation** a ready reckoner planning tool that allows top level planning for out of home.

We welcome proposals from companies for some or all of parts of the contract, and for interested parties to partner with companies with expertise in these areas but will require credentials from all parties involved.

Partners should indicate which sections they are pitching for, with a rationale for why all or only some of the sections.

In addition, we are expecting to award a separate contract to audit the measurement service, so consideration should be given to provision of data and services to enable a smooth process for the audit. Consideration should also be given to how the outputs from Route can be integrated into cross media solutions – such as Origin, IPA TouchPoints and others but also provision of reliable, regular and stable data to inform effectiveness measurement in econometric models.

Interested companies are expected to respond formally to this RFP no later than **Friday 21st April** 2023, expressing an interested to respond by **Friday 24th March**. Expressions of interest as well as submissions should be sent to: Denise Turner (deniset@route.org.uk) and Euan Mackay (euanm@route.org.uk)

Statement of purpose



Requests for initial clarification of this brief should be submitted in email to (deniset@route. org.uk) and Euan Mackay (euan@route.org.uk) by **Friday 24th March** latest. The Route team will be available for in-person meetings to discuss requirements during the **weeks beginning 20th and 27th March**.

Responses should clearly outline how the requirements of each section of the brief will be met, how the Route contract will be managed, with recommendations for personnel. They should also itemise the technical details of their prospective services and assumptions of costs, their prospective methodology and experiences in the field.

Service Level Agreements (SLA)s will also be a necessary inclusion in the contract so should be considered in the preparation of responses. The Route team are happy to discuss our expectations on the SLAs at the clarification meetings.

Additionally, interested partners should provide assurances on financial stability, and be available for questions should that be required.

Responses should be in a word document or pdf format.

Assessment of responses will be made via the Route Team w/c **24th April 2023**.

Recommendations will then be shared with the Route Board and the Route Action Group.

Shortlisted vendors will be notified in **early May** and invited to present at a specially convened meeting of the Route board **in mid – late May**. Additionally, there will be a separate technical presentation to the Route Action group at a similar time.

We are aiming to make a decision on partners for the next contract by the summer. As such we will be working with our legal and procurement partners to ensure compliance and value for money.

Evaluation criteria

This document is very deliberately heavy on the principles of what we want to achieve, and light on the methodology, as we are looking for partners to develop an innovative approach to this project.

As such the evaluation criteria are broad, as a guideline, partners should consider the following (this is not an exhaustive or prescriptive list):

- representivity of data
- speed of delivery
- level of audience reporting
- date specific reporting
- data security and GDPR compliance
- cost (especially an assessment of cost v benefit)



About Route



Route's Mission

Route's mission is to create a complete, continuous, and coherent map of the UK's exposure to out-of-home advertising, acting as a common foundation for the industry.

We collect, integrate, and model complex data sources to create an objective and reliable benchmark estimate of exposures to posters and out-of-home screens, at an individual and aggregate level. Importantly we go beyond exposures to create a measure of impact, by adjusting exposures to reflect people's actual likelihood to see a poster or screen,

Route ensures that the data is robust, accessible, and widely understood, to create the most solid foundation possible for trading, planning and evaluation of out-of-home media.

We are conscious that people's behaviours have changed in a post-COVID world, and our mission going forward is to more quickly reflect those behaviours and provide insights for the wider planning and buying community.

Route's structure

As a Joint Industry Currency (JIC), Route is independent of any special interests. Its Board of Directors has an equal representation from the buyers and sellers of the medium and is responsible for governance and strategic direction. The Action Group considers the approach to the research methodology and its future development. The Joint Industry Currencies (JICs) are owned by the industry – advertisers, agencies and media owners – to provide transparent and objective audience measurement for each medium. These data are produced and sold at cost providing both industry-accountability and a robust trading currency for each medium. Route is committed to a continuous programme of research and development to meet the evolving needs of the marketplace whilst ensuring we deliver value for money for our underwriters and subscribers.





01. Key questions

The following section lays out the key questions that we believe are vital for a successful new contract, and we will be evaluating all responses on how these are answered.

Data collection - what methodologies would you deploy to create an owned dataset that is representative of the universe to be measured and delivers on our reporting requirements on a scale that is robust and agile enough to give us the reliability, granularity and flexibility that we are looking for? And how would you ensure compliance with GDPR regulations while still collecting and providing detailed data? And how frequently could the data be updated whilst maintaining stability in the currency?

Data capability - How will you ensure we have access, via a dedicated team, to the world class expertise required to create and communicate the data sets required from our solution, informed by deep understanding of the specifics of media measurement? How would you help is to analyse and troubleshoot any data issues that arise? We would want a clear process to address this.

Data synthesis - How would you bring together multiple data sets and complex models to deliver, on demand, a singular reporting output that is simple to extract, interrogate and understand?

Data processing - How would you deploy people and technology to maximise your ability to integrate data sets and models, and minimise the interval between approval and reporting?

Data integration - How would you identify, evaluate, calibrate, and integrate multiple behavioural data sets to enhance the accuracy and reliability of our datasets? How will this help us to deliver a single, seamless, cross-environment methodology?

Innovation and R&D - How would you continuously deliver an Innovation Agenda, designed to shape the agility and accuracy of our audience estimates, alongside the consistent delivery of the core reporting task? How would you explore new development areas such as different means of data collection.



02. Contract Deliverables

There are also some more detailed deliverables to guide the responses. Consideration should be given to any trade-off between delivery and cost, and cost options should be clearly laid out.

Whilst we have laid out the deliverables as we see them, we welcome suggested additional deliverables and new approaches.

- 1. Measure how many people are likely to see OOH advertising in public places across Great Britain
- Use "impacts" as the base trading metric
- Potentially extend metrics to include impressions to facilitate cross media comparison
- 2. Measure all adults and a small, tightly defined number of trading demographic and geographic audience subsets
- Provide a core set of profiling variables to be published (10-20 tbc)
- Collect self-completion data for integration and storytelling purposes
- 3. Collect and refresh data in a way that ensures the currency is fresh and contemporary
- Retain the existing publication frequency (quarterly)
- 4. Collect data at as granular geographic levels as a level as possible to enable statistically robust and stable data reporting at regional levels
- Likely constrained to region level (NUTS2 there are 242 NUTS2 regions in GB),
- Requirement to be able to report on key urban conurbations (c.25)
- 5. Regular data collection and publication schedule to ensure currency is contemporary and reflective of real-world behaviours, and should also include facility to add new inventory 'between publications' to minimise the period between build and audience provision.
- Monthly refresh of inventory
- Quarterly audience updates
- 6. Build a single, comparable cross-environment methodology to enable reach and frequency estimates for any combination of measured inventory over user defined campaign durations.
- Retain spot level measurement (or a version of it) for digital OOH and ensure that Route data can be easily incorporated into programmatic trading systems
- Design the model to cope with all inventory in GB i.e. extend to private spaces (gyms, offices, student unions, doctor surgeries etc)
- Must include at least the current provision in terms of environments
- Should robustly allow for stable provision of short term 'spot level reporting' as well as deduplicated campaign reach across different time periods
- 7. Ensure that the methodology adheres to Joint Industry Currency principles: objective, transparent and accountable
- Provide comprehensive and transparent technical documentation on all modelling and processes supported by an accessible / simplified "human-speak" summary for each
- Prepare for and facilitate an independent data and modelling audit (likely as a separate contract to the RFP)



- 8. Provide a single point of securely controlled access for Route data. This should be in the form of API(s) and allow for tiered access to different levels of data.
- Route data can be simplified through providing pre-processed data so people don't have to replicate the algorithm in building systems themselves
- Access to data can be tiered meaning that underwriters get preferential access (respondent level data, journey data etc)
- 9. Output datasets into **a dashboard** that we can mine for insights, storytelling and marketing (which therefore comprise travel and journey behaviour in addition to OOH exposures)
- There is a need for an additional audience dataset to analyse journeys and travel habits –
 can potentially be costed as an option but all data should be collected and processed to
 ensure this is possible.
- Supplement the core data provision with a simple weekly impact dashboard (or equivalent) to ensure easy access to audiences
- 10. Build upon existing knowledge and systems within the industry where appropriate without being beholden to them
- Build upon the knowledge of visibility research and data collection, and data processing but be prepared to for radical change where justified
- Make use of industry systems already in use (such as SPACE and/or the IMS) but be prepared to rethink and rebuild these this can form a separate part of the response to the RFP



3. Additional requirements for responses

Staffing

Route requites a senior level of management oversight and detailed scrutiny. We also need a team that is client-focused, and with a clear process for agile customer service, so that queries and issues are dealt with promptly.

The project director is required to attend all technical meetings. Action Group Committee meetings are currently scheduled once a month, with further meetings likely for specific projects. There are also regular liaison meetings with the Route team.

Prospective companies are asked to:

- Present the credentials of their organisation to carry out the project, including experience of other relevant projects and industry contracts.
- Detail their project management and operation teams, expected headcount, including the proportion of time each member of the team will have allocated to the Route project, and their relevant experience.
- Detail proposed query response times, service levels and any escalation processes
- Outline how they will bring strategic thinking to the project, separately from delivering on the day routeto day
- Give an overview of how they will manage the relationship with Route and any suggestions on how best to work with Route and the Action Group.

Timelines

Route would like to ensure as smooth a transition from the current contract as possible with no break in data provision. Companies are asked to submit a project plan and timeline for the set-up phase, technical deliverables and expected data provision milestones.

Timelines for responses are detailed in the Statement of Purpose at the start of this RFP.

Costs and cost models

Route will seek a minimum 5-year contract commitment with ongoing data provision from April 2025. Both Route and the selected companies will reserve the right to provide cessation notice of a minimum of 18 months.

Companies should outline a fully costed approach for a 5-year contract term, following a successful set up period.

Route are open to two different approaches to costings:

- a higher upfront cost and lower charges for subsequent years
- being charged an equal sum each year. In other words, any set-up or up-weight costs are to be amortised over the period of the contract.

Where applicable, all aspects of the response should be itemised, and the cost implications for the different sections of the RFP explained.

For example, and this is not an exhaustive list, we would like to understand the cost implications for:

Measurement of the core 10-20 audiences



- Different data collection methodologies
- Agile data processing
- Provision of a data delivered by API
- Provision of a summary 'audience dashboard' per release
- Provision of a comprehensive travel dataset (including non-OOH behaviour)
- Provision of traffic data by each link by time of day (vehicles and pedestrians)
- Provision of a campaign analysis system / audience analysis tool
- Development of updated attention metrics

Evaluation criteria

Interested companies are asked to respond to this request, outlining their proposed services, providing full details of the project design and operations, with full technical descriptions and reference material for the measurement solution proposed.

Route will evaluate potential partners based on the information provided and their suitability for the Route service, including cost, time to market and any logistical requirements.

The evaluation will be carried out by the Route team, the Route Board and the Route Action Group with all proposals shared in advance. All of those involved in any decision-making will be party to Route non-disclosure agreements. Interested partners should note these requirements and outline any corporate or legal requests within the submission.

Quality control and documentation

As a Joint Industry Currency, it is vital that transparency, accountability, and objectivity are at the heart of what we do. With this in mind, documentation around the methods which we deploy is essential.

Prospective contractors are encouraged to detail how they propose to ensure that all methods are clearly documented and approved and how this will be managed and kept up to date through the duration of the contract and beyond.

Given the complexity of the Route project, a detailed level of quality control is essential, including a documented system of checks of the data to be carried out prior to every release.

For each release, a full quality control report will be required. This will provide detailed breakdowns of the audiences/impacts and contacts for each specific environment and compare them with the previous release.

All changes are to be logged and checked, and any unexpected variations identified. In addition, a selection of example reach and frequency runs, with different spot schedules, among different target audiences at different times of the year will be required for various example campaigns by environment, again to test the outputs and compare against the previous release. Other quality control reports will be required against agreed criterion appropriate to the proposed methodology.



Ensuring Route data is published error free **and** on time is of paramount import to our stakeholders. Prospective contractors are encouraged to outline quality control measures that would be deployed as well as outlining how Service Level Agreements can be delivered.

Privacy and GDPR

Clearly, it is vitally important to ensure that all data is treated in confidence and that privacy rules and regulations (both currently in effect and any future rules introduced) are adhered to.

Contractors are requested to outline their privacy policies with regards the secure storage and processing of personal identifiable information and to document the steps which will be put in place to ensure that Route data is privacy compliant and perform a full GDPR assessment. This will be particularly important in the provision of a participant level dataset for insights and storytelling, so that personal identifiable information is redacted.





The following section provides more detailed information on the current service and reporting. It should be noted however that any new contract should focus on fresh thinking and provide a nimble and agile approach to out of home measurement.

This covers:

- Current methodology
- Advertising environments
- Inventory types for inclusion
- Universe
- Weighting
- Audience definitions
- Current Route metrics
- · Digital spot measurement
- Data outputs
- OOH environment classification

Current methodology

A full methodological report has been written on Route which can be accessed via Route's website – route.org.uk

Advertising environments

The research requirement is to ensure data is representative of all adults aged 15+ within Great Britain. We should provide advertising audience data for the following out-of-home media environments:

- Roadside
- Transport & transit
 - Tube & similar urban transit systems, all formats, interior & exterior (stations & rolling stock)
 - Rail, all formats, interior & exterior (stations, rail side & rolling stock)
 - Buses (exterior)
 - Taxis (exterior only)
 - Airports (interior and exterior advertising)
- Retail
 - Indoor shopping centres
 - · Outdoor shopping centres e.g. pedestrian shopping precincts
 - Supermarket car parks
 - Motorway service station car parks

The 'environments' outlined above comprise the areas within scope of the present Route remit. There are a range of smaller OOH environments currently out of scope owing to the existing



methodology and sampling requirements, but we would like to revisit those.

See Table 2 for a comprehensive list of OOH environments traded in Great Britain today.

In Scope Inventory

As a guide, the number of frames covered by environment within the current system is shown in Table 1. Please note, however, that the number of frames varies over time as new frames are built and old frames are closed. Therefore, these totals are not perceived as limits to the scope of the measurement system, rather should be seen as being indicative as to the scale of the task.

Any new frames, including new formats, appearing in the stated locations above shall be included, provided the measurement of new formats is agreed to be practicable.

Table 1: Number of frames covered by current Route contract

Environment	Posters	Screens	Total
Airport (inside)	340	310	650
Airport (outside)	43	2	45
Bus (exteriors)	71,649	12	71,649
Motorway Service Station (outside)	1,137	212	1,349
Rail Station	10,990	1,072	12,062
Roadside	75,084	8,588	83,672
Shopping Centre Exterior (pedestrianised shopping areas)	135	75	210
Shopping Centre Interior (shopping malls)	646	1,378	2,024
Supermarket Exterior (supermarket car parks)	483	994	1,477
Taxi (exteriors)	6,128		6,128
Train Carriage (inside)	71,068		71,068
Tram / Light Rail Carriage (inside)	4,083		4,083
Tube Carriage (inside)	91,119		91,119
Underground Station (Glasgow)	673	105	778
Underground Station (London)	28,053	1,824	29,877
Grand Total	364,631	14,560	379,191

Source: Route Research Q1 2023 (R46)



Inventory types for inclusion

The measurement should encompass static, scrolling and digital versions of advertising displays.

For roadside environments, including bus and taxi, there must be clear differentiation between vehicular and pedestrian contacts, so each can be analysed separately.

The universe

The universe is adults aged 15+ in Great Britain, i.e. excluding Northern Ireland, the Isle of Man and the Channel Isles.

Weighting

Respondent level data should be weighted and grossed to population estimates provided by JICPOPs. Again, it is of particular import that the data is representative at local levels as well as at an overall GB level.

Audience definitions

An audience "contact" is currently when an individual has a sufficient "likelihood to see" the advertising structure. This is then defined as having a "realistic opportunity to see" (ROTS) whereby they have spent time within an area from where it is possible to see posters / screens and are travelling in the direction of the ads.

This ROTS figure is then adjusted down by a visibility coefficient to calculate "visibility adjusted ROTS" which are termed 'impacts'. Thus, from an advertising perspective, a "contact" will be "eyes-on" the advertising structure (panel, screen etc.) rather than a simple exposure to the ads.

The delivered data currently provides estimates of the average audience based on the visibility adjusted ROTS for each frame.

Current Route Metrics

At present Route's standard metrics for OOH advertising audiences are:

- Reach: the unique number of people seeing the campaign
- Cover: the proportion of the target audience who are exposed to the campaign (Population / Reach)
- Impacts: the total number of times the target audience sees the campaign (Reach * Frequency)
- Frequency: the average number of times those exposed to the campaign will see it. (Impacts / Reach)
- N+: A breakdown of reach by the frequency of seeing the campaign
- Gross Rating Points (GRPs): a measure of campaign effect. Generated by taking the
 proportion of target market reached and multiplying it by the number of times the ad is
 seen (useful for cross-channel comparisons) (Cover * Frequency)



Route's metrics are *visibility adjusted*. The gross audience exposed to the ads (total volume travelling on links within the visibility areas heading towards the ads) are netted down to account for the probability of the ads being seen. Route only reports those likely to have seen the ads – according to the findings of the eye tracking research (these will be made available) and people's travel within visibility areas.

The netting down process is reflected within the published 'impacts' number. Route does not currently publish pre-visibility adjusted traffic figures (in other words, raw impressions).

Digital spot measurement

For the purposes of clarity, some definitions for digital out of home (DOOH) are included:

- A 'spot' in DOOH terms is the broadcast of a single ad on a single screen.
- A 'spot duration' is the time (typically in seconds) that the spot is on screen for.
- The 'break length' is the duration (typically in seconds) that the ad is not on screen for the time between spots.
- A 'spot schedule' is the combination of the spot duration and the break length typically quoted as "5 / 25" or "10 / 50" meaning the ad is on screen for 5 (or 10) seconds and then off screen for 25 (or 50) seconds.

Route currently has capability to output audiences for any user defined spot duration from one second through to one week. Spot schedules are standardised within 15 minute increments. This means that a spot schedule running at any time within a quarter hour period will deliver the same audience. i.e. a 5/25 spot schedule on screen at 9:01am will deliver the same audience as one at 9:14am but it may be different to that running at 9:16am and 9:33am.

The current measurement for digital frames requires that users define:

- Which frames are included in the schedule
- The time period(s) that the campaign is scheduled to broadcast on each frame
- The campaign duration
- The spot duration (i.e. how long the ad plays on the screen for)
- The break length (i.e. the time in seconds between the ads appearing on screen)

Using these inputs, alongside the matched exposure data from the Travel Survey (i.e. people in the relevant visibility areas at the selected times) we first calculate the probabilistic number of times the ad will play and then the average overlap of time in the area and the time on screen. With this we modify our visibility adjustments to enable the viewing of multiple spots in the same exposure where appropriate.



Data outputs

The output of the survey (that is to say the data delivered by the partner) is currently provided as a series of flat delimited text files + an algorithm. All files are output and supplied quarterly to the agreed timetable.

The respondent level data is currently shared with Route and underwriting stakeholders / data bureaux via a secure ftp site and can be accessed through the raw files or via Route's API.

Non-underwriting stakeholders can only access aggregated data via proprietary analysis systems or through the Route API (managed by Mediatel) which does not form part of the core Route contract.

One of the key challenges with Route is the unwieldy nature and size of the current data. At present the current processed dataset is c. 129gb per quarter. There is a requirement to store at least a year's data and to make that available at any given time which again increases the data load.

Stakeholders are keen to understand whether more efficient data storage and delivery mechanics are now possible with technological developments over recent times.

Route is interested in exploring how the data can be stored, shared and accessed in the most modern, secure and efficient manner and to understand what tools / systems delivery mechanisms may be provided.

We would like to move to a single source API with tiered levels of access depending on subscriptions.

Additionally we are keen to understand how traffic moves around the country by time of day and where people go while out and about – without just restricting this to when they are in areas from where it is possible to see OOH advertising.

OOH Environment Classification

Table 2: GB OOH Inventory classifications

- Airport Enclosed
- Airport Open
- Bars/Pubs
- Bus
- Bus (Inside bus terminal)
- Cinema
- Exhibition and Event Venues
- GP Surgeries
- Gyms/Health Clubs/Sports Clubs
- Hospitals
- Mobile Advertising

- Motorway Service Areas
- Music Venues
- Non-Classified Environments
- Nurseries/Play Centres
- Offices
- Petrol Forecourts
- Residential
- Retail (Other)
- Retail Parks
- Roadside
- Schools

- Shopping Precinct
- Sports Venues
- Supermarket Exteriors
- Taxi
- Train (Carriage interior)
- Train (Rail station interior)
- Tram
- Underground (Tube carriage interior)
- Underground (Tube station interior)
- Universities

Shopping Centre Enclosed



SPACE:

The <u>SPACE database</u> categorises all the OOH inventory available to purchase in the UK. The dataset helps to classify inventory across a range of c. 70 data fields including but not limited to: Advertising Environment, Location, Size, Format (poster or screen). A subset of this database is exported daily for use in Route – all SPACE variables are appended to the data exported. At present the system is 'self-governed' with a 'challenge' process in place – whereby other users can query submissions. Attached is a copy of a field list export for SPACE. (export.csv)

Inventory Mapping System:

The <u>Inventory Mapping System</u> (IMS) is used by media owners to position their inventory correctly. This is a closed system whereby each user can only access information on their inventory. The system receives exported data daily from SPACE and appends it to an underlying mapping system. At present this mapping system is HERE maps. For locations not covered by HERE maps (such as many shopping centres, underground stations etc) bespoke maps are submitted by media owners to the company responsible for the IMS and they 'digitise' and integrate the bespoke maps with the core mapping architecture.

Once the inventory is positioned on the map using the geo-coordinates (input on SPACE by media owners), the ad is rotated to face the correct direction using the Azimuth (angle to North) as also supplied via SPACE.

From there a visibility area is generated using Route's eye-tracking guidelines. This dictates the maximum visibility distance which is dependent on the dimensions of the ad (as received from SPACE). The visibility area is created in a cone shape which extends out at an angle of 120 degrees. The theoretical 'maximum visibility area' is output and is visible in the IMS.

This 'maximum visibility area' is then modified to account for non-movable obstructions (such as buildings etc) and a 'realistic' visibility area is output for use.

This visibility area is overlaid upon the core mapping system. This enables the creation of an association for all the 'links' (roads or paths) from the mapping with the inventory. The IMS presents this information for media owners and enables them to edit the position of their inventory and switch links on/off in terms of their visibility.

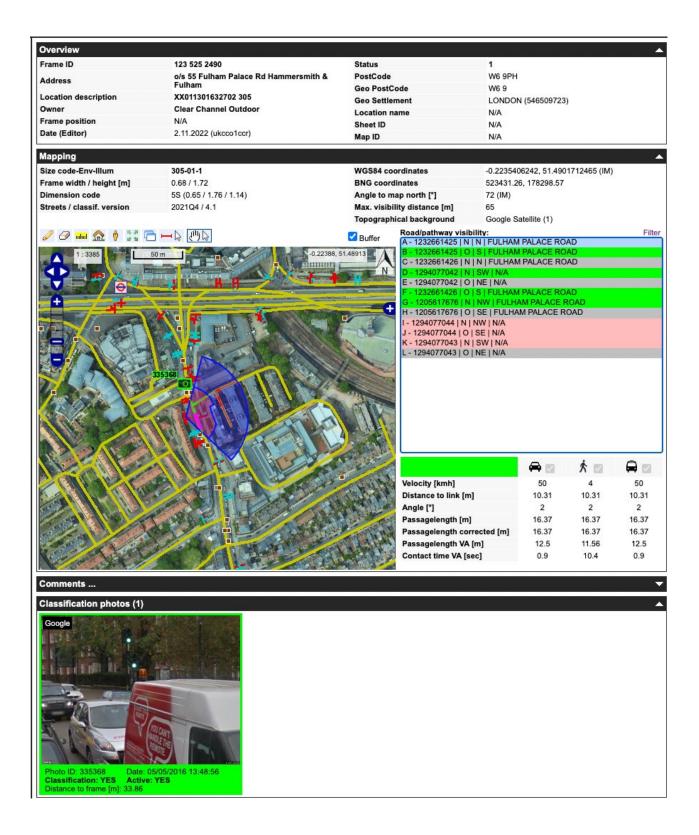
All media owners must upload a 'classification' photo by way of proving that the ad is available to purchase.

Once all is in order media owners approve the submission and sign it off as correct. The role of the IMS is therefore five-fold:

- 1. To correctly locate inventory on a map
- 2. To generate theoretical and realistic visibility areas for the inventory
- 3. To identify all the road and pedestrian links from which it is possible to see the inventory
- 4. To allow media owners scope to edit the location and visible links
- 5. To ensure that media owners have approved the inventory submission



A screenshot of an example IMS submission is seen below.





route.org.uk