



Σύνδεσμος Διαφημιζομένων Ελλάδος  
Hellenic Advertisers Association



Breakfast  
sessions

# Changes & Challenges in the Media Measurement Landscape

# SDE Digital Team



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# Guest speaker



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# Agenda

## Opening Address

## Today's Changing Media Landscape

- Consumers
- Media Ecosystem
- Marketers

## Measurement today

- What we have
- What we don't have
- What we need

## Case for change

- Consequences of current measurement
- Challenges
- Solutions



# Opening Address



Γρηγόρης Αντωνιάδης  
Πρόεδρος Δ.Σ.



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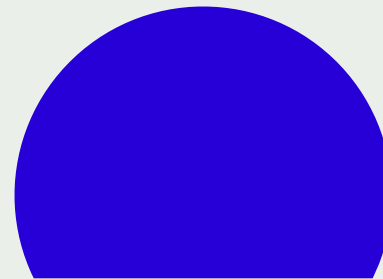


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# Today's Changing Media Landscape

# We are living in challenging times

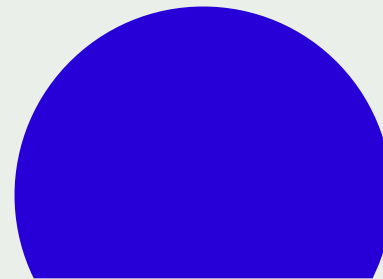
- Complexity
- Fragmentation
- High specialization in media and ad tech
- Jargons and buzzwords
- Lack of internal media teams or central hubs



# With changes in Media consumption

*Significant changes in the way users consume media*

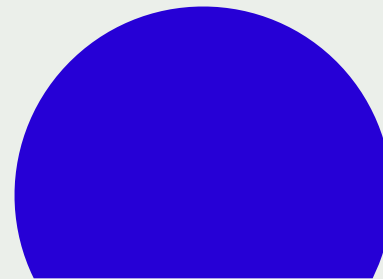
- They are **fluid**
- They are **constantly switching** between devices, platforms, media
- **Multi-media** manners in media consumption
- Content consumption **on-demand**



# In a siloed Media Ecosystem

*It has not completely evolved to match new consumer behaviors.*

- Measurements **under discussion**
- Digital channels are booming, multiplying available touchpoints and **increasing complexity**
- Greatly **fragmented** metrics
- Issues regarding **privacy**



# While our Role is more diverse than ever

Marketer's role is *in transition*

Juggling with:

1) **Economic** pressures

*The need to do more with less*

2) **Technological** demands

*The need to stay up to speed*

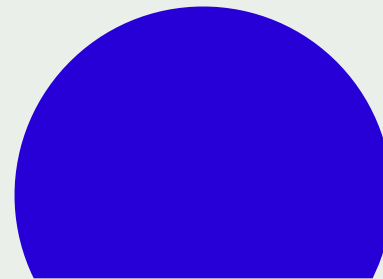
3) High **consumer expectations**

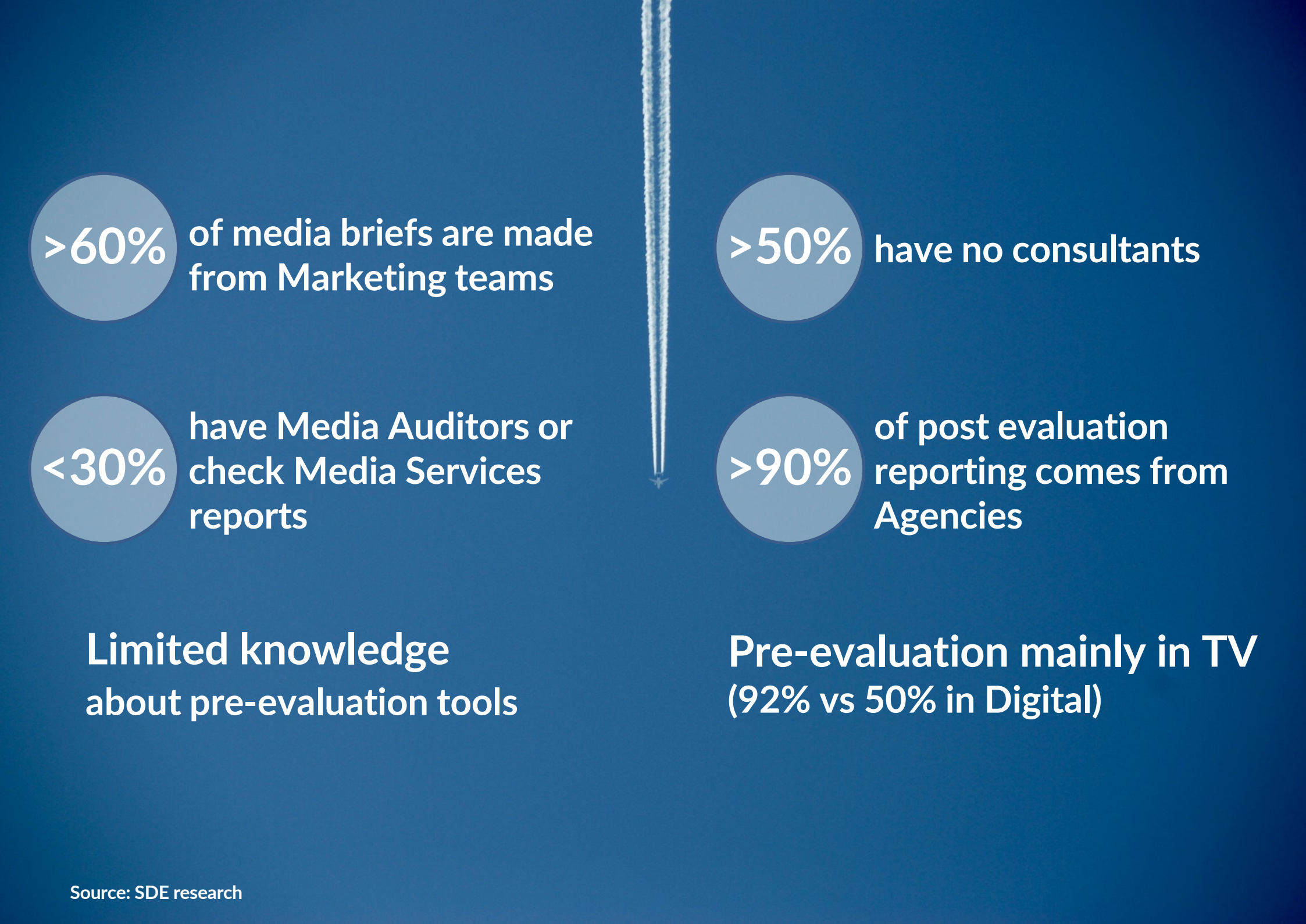
*Brand purpose and changing consumer demand*



# All these changes have impact

- Confusion
- Insecurity
- Significant reliance on external partners
- Limited access to industry updates / shared knowledge
- Vanity metrics
- Quantity over quality





**>60%** of media briefs are made from Marketing teams

**<30%** have Media Auditors or check Media Services reports

**>50%** have no consultants

**>90%** of post evaluation reporting comes from Agencies

**Limited knowledge about pre-evaluation tools**

**Pre-evaluation mainly in TV (92% vs 50% in Digital)**

# New Marketing focus needed

**90%**

of knowledge comes from Agencies

**75%**

of knowledge comes from SDE

**Only 45%**

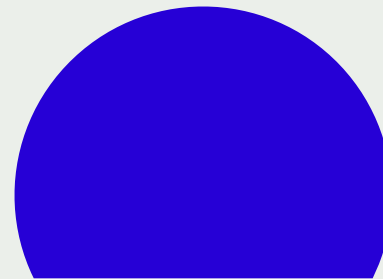
of knowledge comes from  
international hubs

# Marketing teams must be fully updated

*Developments that are taking place in the Global media landscape are fast paced.*

Constant updates and deep dives are needed regarding:

- Technological **developments**
- Most up-to-date **tools** & searches
- Valuable **metrics & KPIs** (quality & quantity)

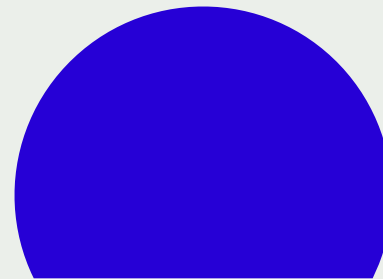


# The Total Frequency challenge

Frequency / channel  $\neq$  Total frequency



Regular fed-up effect



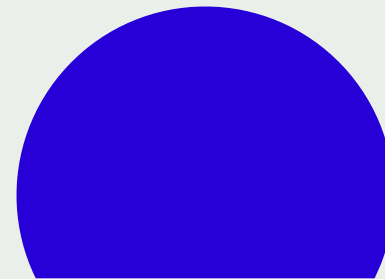
# The Total Evaluation challenge

**1 out of 3**

tries to have a total  
evaluation of its campaigns

# The Measurement challenge

- Are available measurement solutions **future proof**?
- Are they following the **latest consumer trends** and **new ways** of media **consumption**?
- Is the **new reality** reflected in the way we measure and evaluate media?
- Do they give us **incremental knowledge** and support during the **decision-making** process?





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# Measurement Today

TV  
Digital  
Radio  
OOH  
Print

# TV Measurement – via Nielsen

- Representative panel of 1,300+ households
- Structure of panel regularly checked and modified
- Electronic meter (peoplemeter) system tracks what the televisions are tuned to
- Black boxes –computer/modem- deliver the viewing data from TVs to Nielsen every night

## Ημερήσιο τηλεβάρometro - Top 10

ΠΕΜΠΤΗ 31/8/2023

| #  | ΤΙΤΛΟΣ ΕΚΠΟΜΠΗ         |                   | ΣΤΑΘΜΟΣ | ΕΝΑΡ  | ΛΗΞΗ  | ΔΙΑΡΚ | ΤΜΛ (000) | ΤΜΛ% | ΜΡΔ% |
|----|------------------------|-------------------|---------|-------|-------|-------|-----------|------|------|
| 1  | ΠΔΣΦ                   | ΤΣΟΥΚΑΡΙΤΣΚΙ-ΟΛΥΜ | MEGA    | 20:49 | 22:56 | 1:41  | 660       | 6,5  | 22,0 |
| 2  | ΕΡΩΤΑΣ ΦΥΓΑΣ           | (Ε)               | OPEN    | 21:02 | 24:00 | 2:17  | 458       | 4,5  | 15,4 |
| 3  | ΤΟ ΣΟΙ ΣΟΥ             | (Ε)               | ALPHA   | 20:04 | 21:54 | 1:16  | 445       | 4,4  | 17,5 |
| 4  | ΑΘΛΗΤΙΚΗ ΕΚΠΟΜΠΗ       | POST GAME         | MEGA    | 23:02 | 23:17 | 0:15  | 411       | 4,1  | 13,4 |
| 5  | Ο ΤΡΟΧΟΣ ΤΗΣ ΤΥΧΗΣ     | (Ε)               | STAR    | 18:26 | 19:44 | 0:55  | 391       | 3,9  | 18,0 |
| 6  | ΟΙΚΟΓΕΝΕΙΑΚΕΣ ΙΣΤΟΡΙΕΣ | (Ε)               | ALPHA   | 16:49 | 18:42 | 1:26  | 370       | 3,7  | 15,9 |
| 7  | ΣΚΑΙ ΕΙΔΗΣΕΙΣ          |                   | SKAI    | 14:00 | 14:52 | 0:38  | 369       | 3,6  | 19,4 |
| 8  | LIVE NEWS              |                   | MEGA    | 15:58 | 18:32 | 1:58  | 350       | 3,5  | 15,1 |
| 8  | ΕΛΛΗΝΙΑ ΣΤΟΝ ALPHA     | Ο ΔΥΝΑΣΤΕΙΑΣ      | ALPHA   | 21:55 | 23:50 | 1:23  | 350       | 3,5  | 11,4 |
| 10 | ALPHA ΕΙΔΗΣΕΙΣ ΣΤΗ ΝΟ  |                   | ALPHA   | 16:36 | 16:43 | 0:07  | 346       | 3,4  | 15,1 |

ΣΥΝΟΛΟ 4+ (10,120,764 άτομα)

ΤΜΛ= ΤΗΛΕΘΕΑΣΗ ΜΕΣΟΥ ΛΕΠΤΟΥ ΜΡΔ= ΜΕΡΙΔΙΟ

ΚΑΤΑΤΑΞΗ ΑΝΑ: ΤΜΛ

ΣΤΑΘΜΟΙ: EPT 1, EPT 2, EPT 3, ANTENNA, ALPHA, STAR, ΣΚΑΙ, OPEN, MEGA, MAK TV

ΤΥΠΟΛΟΓΙΑ: ΣΥΝΟΛΟ

ΠΡΟΓΡΑΜΜΑΤΑ ΔΙΑΡΚΕΙΑΣ ΤΟΥΛΑΧΙΣΤΟΝ 5 ΛΕΠΤΩΝ



# What is Measured

- AMR / TMA: Τηλεθέαση Μέσου Λεπτού
- SHARE / MPΔ: Μερίδιο (ποσοστό ως προς την συνολική τηλεθέαση)
- **Average Time Spend (ATS)**
- **Affinity**
- **Unique Reach**

# What is not Measured

- No Mobile/Laptop viewing of Linear TV channels content
- CTV Programs (watched on TV screen only) are measured under All Others all together – we cannot see ratings for Cosmote, Nova, Vodafone, Netflix, YouTube, Ertflix, Peripheral Channels etc

# Digital Measurement – a complex landscape

## Walled gardens



- ✓ They measure Reach & Frequency
- Use of different technologies, measure in a different way and **provide different metrics.**
- **Not 3rd party accredited**

## Local sites & Ad servers



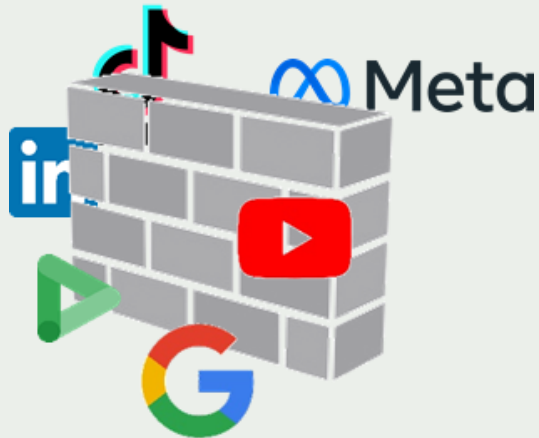
- ✓ They can be 3rd party accredited
- They measure impressions clicks, CTR, events, conversions - **not Reach & Frequency**
- They provide post campaign measurement- **cannot be used as a planning tool**
- They track unique browsers, **not unique people**

## DAR



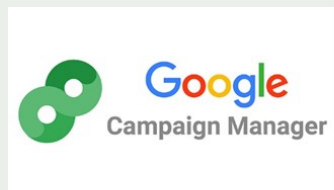
- ✓ Multi-platform view of digital audience (computer, smartphone – tablet)
- ✓ Measures Reach & Frequency
- **Cannot measure local publishers**
- Provides post campaign measurement- **cannot be used as a planning tool**
- It is **not always on**

# Digital Measurement – the challenges



## Platforms

- Too many platforms not 3<sup>rd</sup> party accredited
- No common media metrics definitions- not measuring the same metrics
- No real time measurement
- Cannot measure unique Reach, Frequency & S.O.V.
- Existence of post measurement only tools- Cannot plan our digital campaigns across all digital media used- we plan using assumptions



**The common metric must be Reach & Frequency**

# Measurement of other Media – the challenges

## Radio

### ✓ Measured:

- Avg. Daily and Weekly Reach
- Listenership Share %
- Avg. Amount of Radio Stations per Listener
- Avg. Time Spent per Listener
- Reach
- OTH

➤ Data - for Athens & Thessaloniki only - can be used for estimated efficiencies

➤ No post-evaluation data

➤ Rest of Greece data are from the period Sep-Dec 2019 and can be used only for stations' potentiality

## OOH

### ➤ Not Measured

- ✓ Effort from a specific vendor to create a post evaluation for unique reach and frequency of vehicles and mobile devices, based on visitors' data (telco+gps)

## Print

### ✓ Measured:

- A.I.R. (Average Issue Readership – Αναγνωσιμότητα Μέσου Τεύχους)
- Reach
- OTS

➤ No Data Recency: Research covers only the period June-December of each year. No data for first semester

➤ Data can only be used for estimated efficiencies

➤ No post-evaluation data

# A summary: Reach Measurement capabilities in Greece per touchpoint

## TV



**People Meter**  
Minute by Minute  
Adults 4+



<http://www.arianna.gr/gr/data/default.htm/>

**Reliable & Established  
Market Tool – still with  
some gaps**

## Digital



**Digital Ad  
Ratings (DAR)**

Digital Ad Ratings leverages census-based data, Nielsen panel assets, advanced machine learning methodologies, and strategic third party datasets to assign demographics and deduplicate across sites and devices to produce comprehensive audience measurement.

<https://www.nielsen.com/solutions/audience-measurement/digital-ad-ratings/>

**No use of People Panel  
Unclear Methodology**

Paused by P&G Jan'23 onwards due to low data quality and PII data / 3rd party cookies challenges

## Print



**Day After Recall**  
Average Issue Reading  
National Readership Survey

20weeks / Per Year  
Adults 13-74  
Telephone Interviews (CATI)  
Annual Issue

<https://focusbari.gr/el/%cf%80%cf%81%ce%bf%cf%8a%cf%8c%ce%bd%cf%84%ce%b1>

**Claimed Data**

## Radio

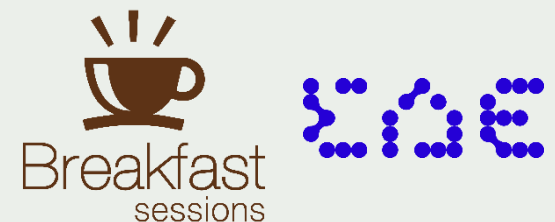


**Day After Recall**  
Personal Telephone  
Interviews

Athens – b Salonica  
Adults 15-70  
Telephone Interviews (CATI)  
Quarterly Issue

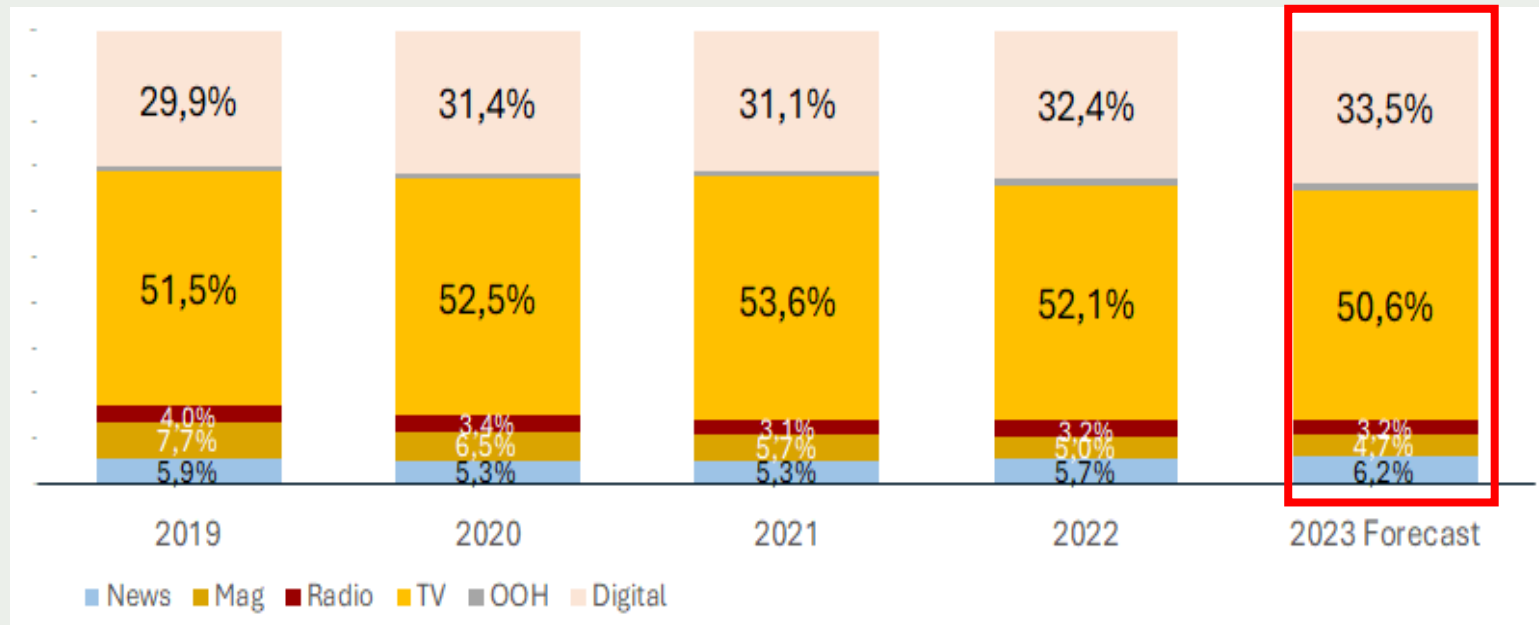
<https://aemar.gr/i-taytotita-tis-ereynas/>

**Claimed Data**



# A shocking realization...

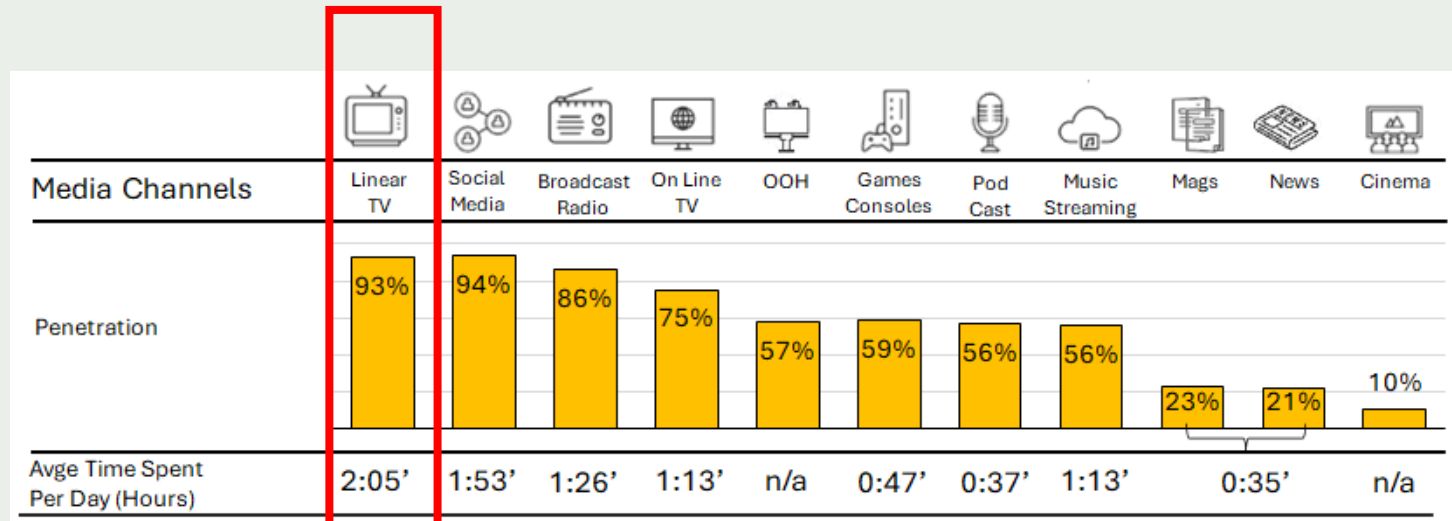
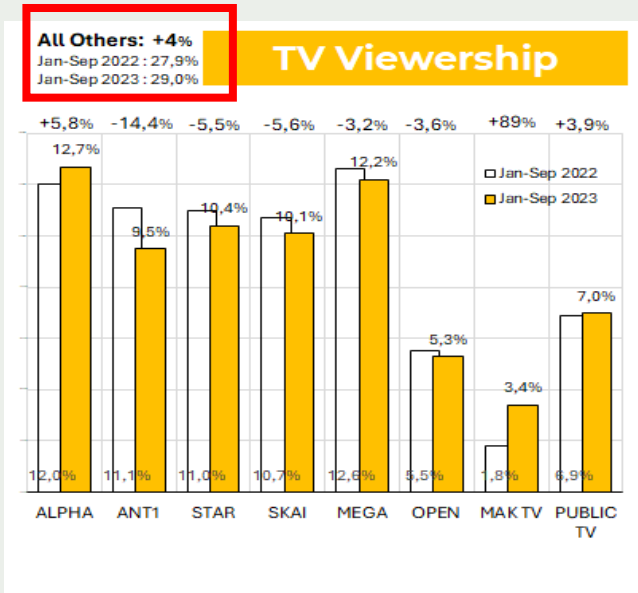
## Total Advertising Media Investment Evolution



- **≈ 51% of Media Investment is placed on TV**
- **> 85% of this TV investment goes to the main 8 channels (6 big+State TV+Makedonia TV)**
- **≈ 45% of Media Investment is tracked/measured via People Panel Methodology, 3<sup>rd</sup> Party Accredited**
- **Effort from some Agencies to leverage suboptimal solutions for rough CMM calculations**
  - e.g. Sainsbury formula

*Data Estimations from Publicis/Starcom Media Agency & local market knowledge*

# A shocking realization...continued



Source: GWI, Period: Q3 2022 - Q2 2023 | TGI, Period: June'22 -May'23, Target Group: Adults 18-64

- ≈ 70% of TV Viewership is driven by the main 8 channels – Rest 30% is ALL OTHERS
- And only 21% (125 minutes/589 minutes) of daily media consumption is tracked/measured via People Panel Methodology, 3<sup>rd</sup> Party Accredited

Data Estimations from Publicis/Starcom Media Agency & local market knowledge





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# Case for Change

# Case for Change – Consequences of current measurement

- **Waste of millions:** Separate measurement systems preclude an understanding of true Reach & Frequency. Considerable amounts of impressions bought are driving negative value to advertisers and lead to wastage of millions of euros.
- **Consumers exposed to excessive frequencies, becoming apathetic or hostile towards advertising:** which can be reversed via an improved consumer experience by avoiding excessive ad frequencies.
- **Missed opportunities for the sell-side:** Improved measurement enables the media companies to better value their inventory to attract ad spending.

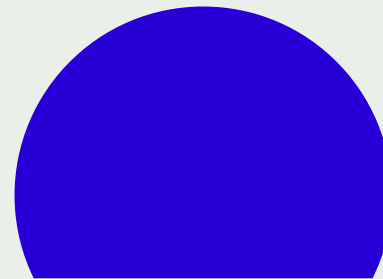
# The Challenge

## Today

Greece's current advertising ecosystem cannot accurately provide deduplicated Reach & Frequency across Media

## Challenge

How do we create a way to consistently count unique people reached across publishers & platforms with a high degree of accuracy, while respecting user privacy?



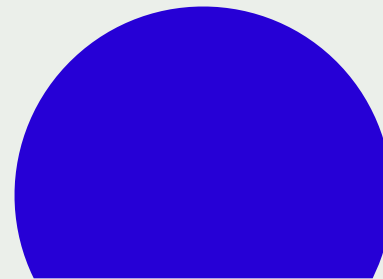
# The Challenge – in detail

How can we better count **unique (un-duplicated) people across all formats, publishers, platforms and media...**

- *in a consistent and continuous/always-on fashion;*
- *enabling full-lifecycle measurement across campaign planning and reporting;*
- *with accuracy and scale (measuring all impressions, not just a sub-set);*
- *in a full-funnel approach (Reach & Frequency also but also outcomes reporting);*
- *while strictly respecting user privacy.*

# The Solution Globally: Cross Media Measurement - The Holy Grail

An advertiser led, collaborative industry measurement solution that provides complete measures of all advertising exposures and produces privacy-compliant, cross-media, deduplicated, reach and frequency metrics.



# The Benefits when we solve

- **Improved Media Effectiveness**

We need advertising to be effective and efficient. To do that we need the data to measure how many and how often an ad campaign reaches consumers.

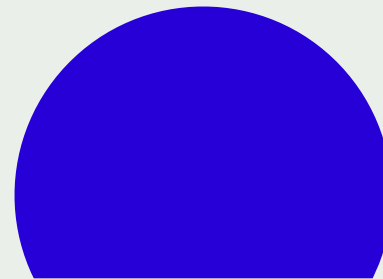
- **Improved Consumer Experience**

We need to improve consumer experience through the elimination of excessive frequency and unwanted advertising leading to stronger brand perceptions.

The broken ad experience is leading to increased use of ad blockers

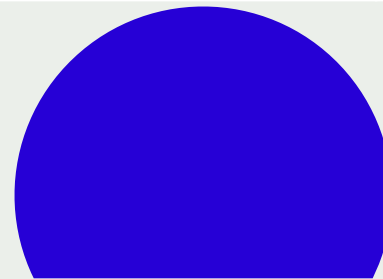
- **Improved Measurement Transparency**

We need to improve measurement for the sell side to have better tools to value their inventory & attract ad spending



# From...To

|                              | FROM                                                     | TO                                                                                                              |
|------------------------------|----------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|
| <b>Planning &amp; Buying</b> | Little understanding of unduplicated R&F across channels | Planning & optimization enabled by deduplicated R&F across all channels                                         |
| <b>Campaign Evaluation</b>   | Singular view of a channel delivery                      | Evaluate the cumulative effects of a campaign across all media channels and devices including value of channels |
| <b>Consumer Media Usage</b>  | Inconsistent measurement across platforms                | Consumer centric measurement of exposure across all platforms (privacy centric)                                 |
| <b>Outcome &amp; ROI</b>     | Wasted investment & excessive frequencies                | Decisions based on business impact, ROI, elimination of excessive frequency                                     |





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# WFA's proposed solution

# Key Global Stakeholders Collaboration

## WFA

- Driver for evolved cross media measurement solution
- Leading development of industry-agreed principles and framework for markets to adopt and adapt with a view to Global consistency
- Advertiser needs & industry Requirements addressed via 'NorthStar'



Co-created by advertisers and with particular collaboration from the following advertiser associations:



## HALO

- A game changing collaboration across Global digital platforms, advertisers, association and others
- Centrally developing open-source software code for both core components and reference implementations, from the Technical Proposal, that can be leveraged as part of pilots in the UK (Origin) and the US
- Making these components available (license free) to the markets seeking CMM solutions
- MRC working in an advisory role related to standards compliance



# Principles – Advertisers' Needs



## #1 Full lifecycle

- De-duplicated cross-media Reach & Frequency across the full lifecycle of media management



## #2 Continuous

- Tagless, always-on data capture



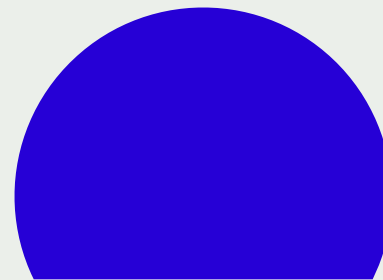
## #3 Comprehensive

- Television & digital (but not limited to video), with all campaign data captured



## #4 Full-funnel

- Reach & Frequency comes first but outcomes reporting also in scope



# Principles – Industry Requirements (that advertisers support)



## #5 Privacy-safe

- Solutions for an evolving regulatory landscape which have respect for privacy at the heart



## #6 Fair & objective metrics

- Metrics for comparability (but not limited to one metric)



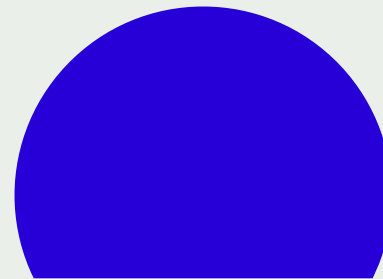
## #7 Trust & Transparency

- Enshrined through regular audits with bodies such as the MRC



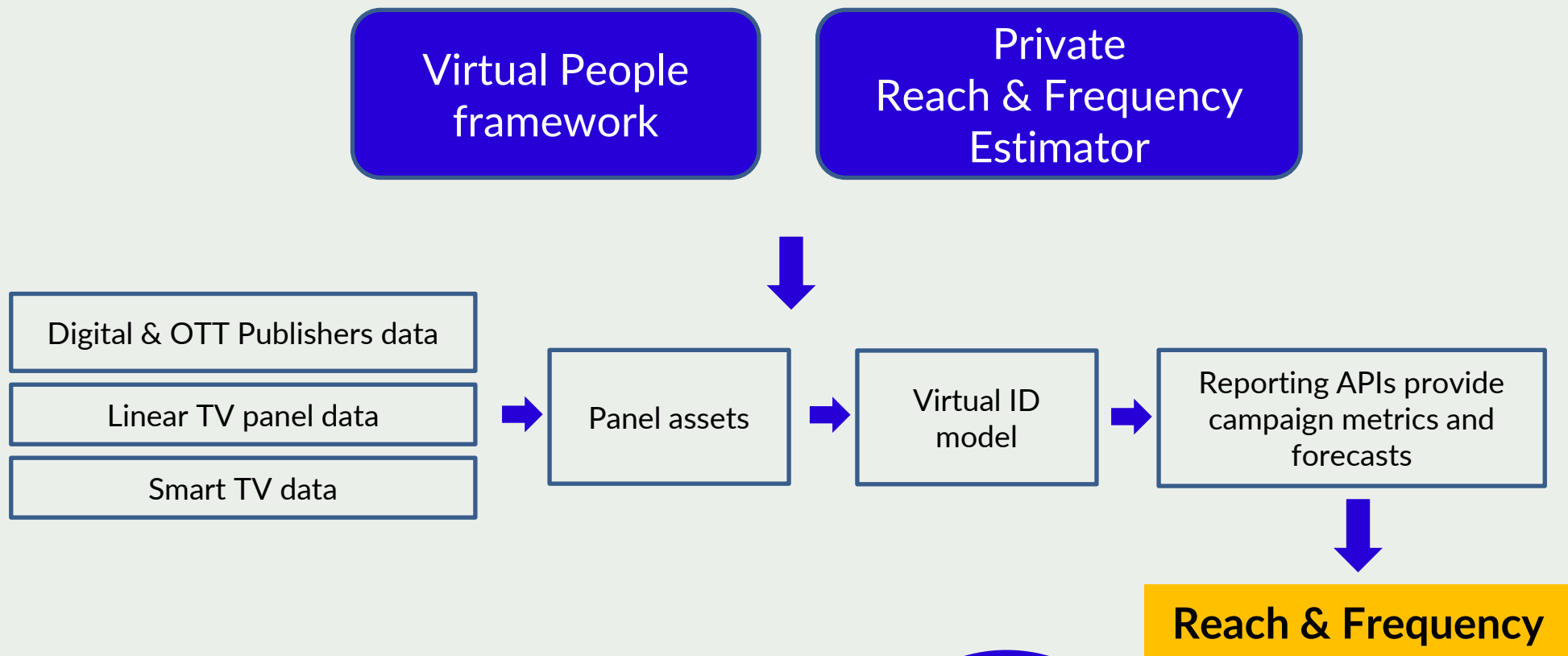
## #8 Advertising & content specific

- Advertising measurement is key but context and editorial should also be measured



# The Halo framework

**2 technologies needed** to deduplicate reach and frequency across multiple data providers (e.g. broadcasters and publishers). **The VID model** uses all data at its disposal to accurately assign **TV** and **digital** impressions to a lookalike.



*\*Virtual Person ID or VID, is assigned demographic attributes (e.g. geographic Location) so that the distribution of the characteristics of VIDs match those of the population under measurement.*

# Status Today – What SDE has done so far?

- **Team Allocation** Digital Team and members of BoD assigned to the project
- **WFA Halo Team**
  - Extensive collaboration with WFA's HALO Team for updates & support
  - Studied all related material including HALO Framework with all necessary steps for local deployment
- **Meetings with**
  - WFA Media Leaders
  - Swedish Association
  - Canadian Association
  - Contacted ISBA/ORIGIN

# Status Today – What SDE has done so far?

- **Vendors**
  - Meetings with Nielsen
  - *Kantar and other vendors TBC*
- **Knowledge**
  - Attended :
    - Webinars
    - HALO Events
    - Int'l Knowledge Exchange meetings
    - NAC meetings on Audience Measurement
  - Read tons of articles and studies on XMM from different markets
- **Publicity** Interviews, Opening Speeches to make industry aware of our needs and our intentions
- **Members** Inform members on current metrics limitations and share vision for a CMM solution

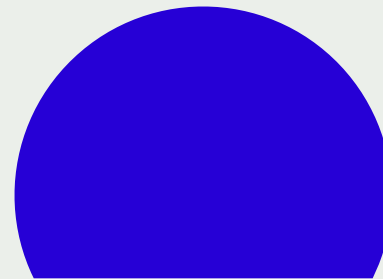


# Challenges of a CMM solution as they come from abroad

- Needs collaboration by ALL
- Costs a lot
- Takes TIME
- Needs advanced tech solution: Panel(s)
- Needs clear, strong governance and entity with specialized talent to operate it

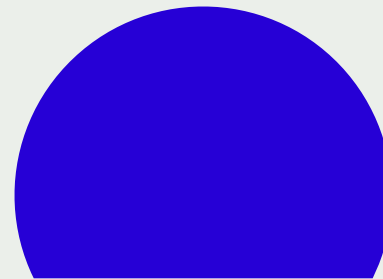


BUT it's the only path forward



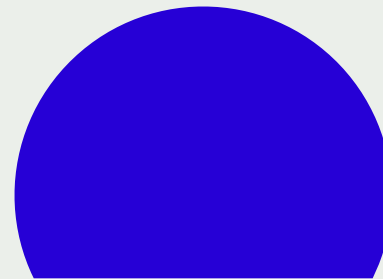
# Where do we go next?

- Influence better TV measurement
- Work for a new Digital Audience Measurement through the JIC formed under IAB's lead
- Continue learning on CMM solutions/results under Halo



# What's our ask of you

- Endorse our vision for a common, cross-media measurement as the key way to move ahead
- Share your belief in a CMM solution with your agencies, so that they put pressure on Media to collaborate
- Be prepared to invest and test possible solutions





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**Thank you!**



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# Changes & Challenges in the Media Measurement Landscape