Origin Cross-Media Measurement platform

Key messaging and clarification of some potential misunderstandings

October 2024

Key Messaging

1. **Origin is happening.**

   Origin is definitely happening. The launch of the Beta trials phase using real campaign data occurred in October 2024 involving thirty-five of the largest UK advertisers, who collectively invest c. £3 billion annually in media expenditure. Full market launch is expected in Q2 2025.

2. **Origin has strong advertiser support and backing…..**

   Origin is the UK manifestation of the World Federation of Advertisers (WFA) global cross-media framework. The clue is in the name – Origin is driven by brand owners and there is a desire from global advertisers to have a comprehensive platform in all markets.

   At the same time an Origin equivalent, Aquila, is being built in the US.

3. **...and has been driven by stakeholders from across the whole of the industry.**
   - **a.** As well as brand owners and the four largest digital platforms (Google, Meta, Amazon and TikTok), Origin has agency stakeholders (all of the six large global advertising networks), the trade association for agencies -the IPA as well as sell-side representation from the Demands Side Platforms (TTD), publishing (Ozone, PPA and Newsworks), audio (Bauer), direct mail (Royal Mail and Market Reach) and connected TV (Samsung Advertising).
   - **b.** As we progress through Beta trials and towards launch, we expect to add further stakeholders across the advertiser, agency and media-owner sectors.

4. **It is the only solution that ingests independently audited, first-party data from all the major digital platforms.**

5. ***It is hard to build something this complex.***

   Origin will be a world-first and is an ambitious programme that balances advertiser and industry needs with the appropriate technical implementation, privacy framework, governance and commercial model.

   There is no blueprint and Origin are pioneers in attempting to solve difficult challenges, often against a backdrop of suspicion and less than universal support.

We are disrupting the market but only to deliver better insight and help the industry make better advertising decisions in an increasingly complex and fragmenting advertising market with an accelerating pace of change.

6. Granular data output will help advertisers to minimise wastage and drive effectiveness (and make for a better ad consumption experience for consumers)

- **a.** Origin is designed to surface insight which will deliver a clear view of deduplicated reach and frequency across digital video, digital display & linear TV at launch – with more media types being integrated post launch.
- **b.** Origin will allow the user to control what data they want to look at, be it all measured impressions (AMI), two second MRC standard for cross-media viewing or other metrics. With all data from a single-source, this will help advertisers to better understand where value can be driven.
- **c.** We believe that with better control of ad schedules, Origin will help reduce the sense of ad bombardment that can characterise the current ad environment. This environment has done much to contribute to the public's mistrust of advertising as reported in recent Advertising Association publications.

7. We are not suggesting that all impressions are equal.

- **a.** Origin measures the opportunity for impact, i.e. who has seen what, but it doesn't seek to ascribe the value to individual metrics – indeed, this may vary depending on advertiser, campaign, call to action, etc..
- **b.** Comparing different ad inventory to try and establish equivalence, is not a new challenge – just within TV there is varying impact across sponsorship, product placement and placements within the ad break.

  However, the comparison of different ad inventory and different ad formats is becoming increasing difficult as media owners and ad formats continue to proliferate, as audiences for advertising fragment at an increasingly accelerating rate and as the role that media channels play on campaigns continues to blur.

  Origin facilitates the comparison and crucially, allows the comparison to be made from a single-source data set.

8. Origin will not lead to 'lowest common denominator' planning.

- **a.** This is a criticism levelled by some dissenters in the market. The charge is that Origin will lead to all comparisons between different media types and ad formats, being made at the lowest level possible – for example, all measured impressions.

  Our response to this is twofold:

- It belittles the crucial role that agencies play in guiding on the best channel and platform strategy for given client objectives. The role of agencies becomes even more important in helping guide advertisers through this complex marketplace.
- There is a persuasive case that, in the absence of a level playing field like Origin, that lowest common denominator planning has happened already with (probably invalid) comparisons made from different data sources and likely based on false equivalency. Certainly, the shape of advertising investment in the UK in comparison to most other markets, shows that the majority of UK ad spend has been invested into platforms that have no independent audience measurement. Hence, we believe that this criticism is akin to 'shutting the stable door after the horse has bolted'.

If factions in the market want to manipulate data and claim false equivalency, this should not be laid at Origin's door. Rather, the counter is that Origin, at the very least, allows never-before available comparison from a single-source data set and that goes a long way to levelling the measurement playing field.

We believe, that for all media owners, Origin will facilitate comparisons and will allow them to make a case for inclusion on campaign schedules.

9. Transparency and accountability are front and centre of Origin.

a. The WFA cross-media framework principles demands that Origin must be transparent and trusted. Media owners who wish to integrate with the Origin platform will require independent audit of their input framework to an exacting specification. A full and comprehensive, end-to-end audit framework will be applied to the Origin programme.

b. This is a significant undertaking, and the framework will evolve and develop as Origin builds and extends its capabilities. This will give confidence in what has been put in place and the data being produced.

10. Is Origin looking to replace Barb?

a. No. Origin answers to a different use case of planning, evaluation and reporting than the Barb use case which provides the currency for the TV market and forms the basis of trading between agencies, advertisers and the broadcasters.

b. **Origin offers second-by-second linear TV viewing data.** The WFA cross-media framework recommends that duration data should be reported at the second level. Hence Origin linear TV data offers a granularity of analysis which currently isn't available from Barb – that is, at the second-by-second level, enabling both custom and MRC standard measurement of campaigns.

For example, as well as being able to surface measurement at the All Measured Impressions (AMI) level, the MRC 2 second level and the 100% compete level, Origin will also allow 25%, 50% and 75% quartiles to be output also.

The facility to measure absolute levels of duration e.g., ads viewed up to 6 seconds, is on the Origin roadmap for future development.

11. What is next on the Origin roadmap?

a. **An ambitious development plan.** Origin has an ambitious development roadmap stretching across many years. Following the Beta trials, Origin will enter a short pilot phase before it becomes open to the whole market with its Version 1 launch at the end of quarter 2 in 2025.

b. **More features, improved UI, better reporting.** Across the period of the Beta trials phase, more product features will be added (e.g., more granular demographic data will be made available), the User Interface (UI) will be improved (e.g., better report scheduling) and enhanced reporting options will be surfaced.

c. **Bigger market coverage.** At launch, we estimate that Origin will cover c. 70% of UK ad spend. Following launch, Origin will be working hard to add more market coverage to add more media owners and increase market coverage.

d. **Enhanced capabilities.** Also, part of the roadmap is the development of planning modules that will allow aggregated data by market vertical, and tactical & campaign planning modules which will facilitate better planning of future campaigns and in-flight optimisation of live campaigns. The goal is to enable to enable real outcome measurement (e.g., attention, brand-lift and sales). In the meantime, the building blocks of this workstream have already begun with the specification for building an outcome API which will allow the efficient delivery of Origin data into econometric models.

Answers to potential market misunderstandings

a. ***'Is Origin being built by the big digital platforms for their benefit only – after all, they are majority funders?'***

Origin is being built by ISBA which represents c. 170 UK advertisers who account for about 40% of UK agency ad expenditure.

Whilst the platforms have been the majority funders in the development phase of the programme, the in-life funding of Origin moves to a buy-side majority position. This is unlike any of the existing UK Joint Industry Currencies (JICs), who are majority-funded by the sell-side.

In addition, advertisers have elected to contribute towards the funding of the programme via direct annual fees and through the creation of the Fractional Advertiser Contribution (FAC) – a levy of 0.1% of working media budgets. Some advertisers have elected to start paying the FAC 18 months prior to the launch of the Origin service which further underlines advertiser commitment.

b. ***'Won't the platforms be marking their own homework?'***

On the contrary, the platforms will be releasing data from behind the confines of their walled gardens.

This will be the first time the platforms will have done so and their willingness to integrate their data with the Origin platform should be welcomed. It also reinforces the Origin approach to data-privacy with no Personally Identifiable Information (PII) being surfaced from the Origin system.

c. ***'Why is Origin taking so long to build?'***

We do not believe it is, especially if you make comparisons with development programmes within existing audience measurement systems. The assimilation of media and ad consumption through different devices, audience fragmentation, a plethora of ad formats, unclear standards for comparability and stringent privacy requirements, is an extremely complex task. We maintain that if it were not so difficult that an independently audited and verified cross-media measurement platform would already exist.

The concept of an independent comprehensive cross-media measurement platform was surfaced in 2017 when Phil Smith became Director-General of ISBA. The next few years involved raising development funding. Build of the platform only started in earnest in 2022 when Kantar started building the 2,500 HH panel and Accenture began the build of the platform infrastructure.

To arrive at a launch position in 2025 represents swift progress for what will be a world-first despite what some partisan trade publication articles might try to infer.

d. ***'Shouldn't only apples-with-apples comparisons be made?'***
No. There is a school of thought amongst some segments of the market that comparisons should only ever be made against the same type and structure of ad. For example, television ads should not be compared with ads on digital video platforms since they may appear in different contexts, with potentially different levels of viewability and potentially for different durations.

Like-for-like comparisons may have sufficed in a less complex and fragmented media world where each media type often had distinct roles to play on campaigns. Unfortunately, life is no longer that simple. It is not an unreasonable request for advertisers to measure deduplicated reach and frequency across, for example, a campaign on linear tv, BVOD, Netflix, YouTube and TikTok. This does not mean that advertisers ascribe the same value to all impressions but reach and frequency measurements is one of the fundamentals of determining campaign achievement.

The Origin position is clear on this – in an extraordinarily complex and ever-changing market, apples-with-pears comparison is absolutely a necessity to begin to measure achievement against campaign objectives, to help ascribe value and to ultimately help advertisers and their agencies achieve more effective and efficient advertising campaigns.

e. ***'Won't Origin set low standards of ad viewability in the market?'***
To be clear, Origin is not a standard-setting body. Origin will incorporate any agreed standards that already exist in the market (for example MRC 2 second duration, 100% pixels in view – video cross-media standard) and will be able to accommodate any future standards but Origin's role is to facilitate the comparison against metrics that advertisers and agencies wish to use to achieve

f. ***'Shouldn't Origin stick only to video measurement?'***
No. Classification of media types and ad formats is an increasing challenge – even the definition of video and display ad formats is not as straight forward a process as might be imagined at first sight. But in any case, advertisers need the ability to measure across the entirety of their media investment especially against this backdrop of increasing complexity, the defining of media types and, finally, the amount of UK advertising expenditure invested outside of video.

In addition, a fully comprehensive platform with the ability to integrate all media channels is a requirement of the WFA cross-media framework.

g. ***'Why aren't the broadcasters stakeholders in Origin?'***
It is no secret that the broadcasters are not Origin stakeholders. They have raised five challenges that they feel the Origin system presents. Origin believes that three of these challenges have been resolved and that two are work in progress. The broadcasters think otherwise.

Whilst it is their decision to engage or not, we still maintain that Origin will enable the broadcasters (and all participating media owners) to surface key comparison metrics from a single-source dataset and make the case for their particular medium.

We will continue to engage positively with them and hope that their position changes in the future.

h. ***'Why isn't Origin currently using Barb as its source of linear TV audience data?'***
Origin has been designed to work with data from the UK Joint Industry Currencies (JICs) and sincee inception, Origin have worked closely with Barb with the intention of using Barb data as the TV data source in the system.

Barb's audit requirements means that the use of Barb data currently prevents Origin delivering the full scope of its WFA requirements to its stakeholders:

- **a.** Video - No measurement below the 2 second MRC standard
- **b.** Display - Disallows All Measured Impressions (AMI) and therefore does not allow comparison of display, video and linear TV. In effect, this means that the use of Barb data would disallow cross-media comparison beyond the TV and video use case.

i. ***'How is Origin sourcing linear TV audience data?'***
Following a mandate from the ISBA Council and ISBA Executive Committee, Origin is using its own 2,500 household panel to develop its own linear TV measurement source. And it is this data that is being used in the Beta trials.

j. ***'Is this data inferior to Barb's?'***
The Origin panel is being built by Kantar, who are also the providers of the Barb panel and uses the same hardware. Barb panel selection methodology is different than that employed by Barb and the Barb panel is larger than the Origin panel – 7,000 households in comparison to Origin's 2,500.

This means that Barb can measure to a greater granularity with a greater degree of statistical confidence than Origin. That said, currently the Origin use case is to provide audience measurement at the total TV level with the Origin panel being more than adequate for this task. Indeed, the margins of error at this level are likely to be lower than some of the granular analyses that Barb carry out on a regional and sub-demographic level.

Of course, a bigger panel would be better, but this is always a trade-off between cost and benefit. Origin is currently investigating the augmentation of its panel data with some data sets available in the industry to improve its data and allow more granular analyses.

k. ***'Won't two sources of TV data be confusing for the market?'***

Advertisers have been vocal that this is not the case. We point to the different use cases of Origin and Barb and the fact that the market is adept at using many different tools with many different data sources. For example, the BBC use their own TV data from their proprietary cross-media panel for reporting total BBC reach to Ofcom.

l. ***'Will Barb data be available alongside Origin data in the platform?'***
We continue to work closely with Barb, the IPA and agencies and remain committed to finding a resolution to surface Barb data alongside Origin linear TV data – a solution that is acceptable to all parties.