

Social Media Measurement Guidelines
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Key Sponsoring Associations:

Media Rating Council (MRC)

American Association of Advertising Agencies (4A's)

Interactive Advertising Bureau (IAB)

Word of Mouth Marketing Association (WOMMA)

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1 Overview

This document presents a guideline for the measurement of certain types of Social Media activity conducted by consumers who use media. For purposes of this document, Social Media is defined as created, shared or exchanged information, ideas, and pictures/videos in virtual communities and networks/connections via any tool. The document was prepared for the use and benefit of the media Industry, especially those constituents that analyze behavior or user-generated/posted information, measure advertising and those that attempt to monetize events (whether buyer or seller) in a Social Media environment.

Furthermore, for purposes of this document, a Social Media Platform is defined as a media vehicle, site (as a whole or in part), app, widget or other media mechanism that has a social orientation; specifically, that captures user commentary and facilitates sharing of information among users of a defined network – i.e., representing a channel for sharing information, opinions or experiences from users of that platform – or allows cross-user collaboration

1.1 Goal of Guidelines

This document establishes a detailed set of methods and common practices for entities that measure Social Media activity. Guidelines are intended to establish and document good practices of measurement; improve practices and disclosures used by practitioners; and also provide education to users of Social Media data from all segments of the Industry.

This document also establishes a recommendation and a benchmark for audit processes whereby the practices and disclosures of Social Media measurement organizations can be validated by third parties.

1.2 Development Process

The guidelines contained in this document originated from a project led by the American Association of Advertising Agencies (4A's), Interactive Advertising Bureau (IAB), Word of Mouth Marketing Association (WOMMA), and facilitated by the Media Rating Council (MRC), with the participation of a large group of Social Media vendors, publishers, measurement organizations, ad-servers, ad-networks and other interested organizations. These guidelines will also be reviewed and approved by major buyer-side trade organizations (ANA) and their constituents and thereafter provided to the public through a formal period of public comment prior to formal adoption.

The final guideline is expected to be published and available on the websites of the 4A's, IAB and WOMMA, and will be re-assessed periodically to ensure it remains applicable over time.

1.3 Development Team

Associations – Primary Sponsors/Facilitators

Media Rating Council (MRC)

American Association of Advertising Agencies (4A's)

Interactive Advertising Bureau (IAB)

Word of Mouth Marketing Association (WOMMA)

Participating Organizations

140 Proof

360i

AddThis

AdMaster

AdsNative

Advertising Research Foundation (ARF)

Allen & Gerritsen

Alliance for Audited Media (AAM)

Allrecipes.com

American Express

Association of American Advertisers (ANA)

BPA

Buzzfeed

Centro

Chartbeat

CMP.LY

Crowdtap

Crosby Marketing

C-Suite Communications

Deloitte

DoubleVerify

Eleven

Energy BBDO

Engagement Labs

Ernst & Young (EY)

ESPN

eyeReturn Marketing

Facebook

Geddes Analytics

GfK MRI

Havas Worldwide

IDG Communications
IM Services
IPR Measurement Commission
JEGI
Kantar Media
KDPaine & Partners
Keller Fay
KPMG
LinkedIn
Mansueto Ventures
Mashable
MEC Global
Merkle
Momentum World
Nativo
NeoReach
NBC Universal
Nielsen
Ogilvy
On Ideas
PricewaterhouseCoopers (PwC)
Pubmatic
Purch
SapientNitro
SAS Institute
Scripps Network Interactive
Shareablee, Inc.
ShareThis
Socialbakers
Sony Pictures Television
The Daily News
The New York Times Company
Time Inc.
Travelers
Twitter
Univision
Unruly Media
VideoAmp
VML
WWE
Yahoo!
Zoom

1.4 Scope and Applicability

These guidelines are intended to cover the methods used for measurement of certain types of Social Media activity including: (1) tracking/counting users accessing Social Media or relevant content within Social Media, (2) Interaction or Engagement with Social Media content, and (3) consumer listening and consumer sentiment. Activity generated on devices of all types – personal computers, mobile devices, tablets, etc. – are considered herein.

This document is principally applicable to Social Media Platforms or User Generated Content (UGC) collectors (that produce or enable measurement of their platform activity), third party Social Media measurers or aggregators, Internet and mobile companies, ad-serving organizations and other generators of Social Media incidence information and is intended as a guide to accepted practice. The sites, applications and platforms for which this document is intended generally include the presence of some form of advertising or branded content or user commentary (UGC) about either.

In the context of this document, UGC generally refers to organic (holistically sourced content created by users and not paid) content generated by peers or users of Social Media Platforms. Owned Social Media content and Paid/Sponsored UGC is specifically addressed separately within this document. This document excludes “top-down” sources (professional Influencers) such as bloggers with topic influence. While blogs are a viable and valid aspect of Social Media and these guidelines can and should be applied to blog measurement, unique aspects of blogs such as content sourcing and subscriptions were not considered herein. Social Media Influencers, as defined later in this document, are included herein.

Additionally, marketers, advertising planners and buyers can use this document to assist in determining how accurately measurement parameters are executed.

Measurement techniques based on real-time data collection as well as periodic/batch data collection and analyses are considered herein.

1.5 Revision Process

The MRC intends to establish an ongoing process to refine and maintain these guidelines in the future.

1.6 Definitions

Authorship: The original piece of content or, original action unrelated to original content (exposure metrics that measure general use of Social Media Platforms, without engagement).

Brand Advocacy: Activity whereby a user creates favorable UGC about a brand or product, and then passes on positive messages about the brand to other users.

Client Side Counting/User Initiated Events: Counting based on events originating from the user's browser or other media operated by the user which are closest to the actual Social Media event being measured (for example, counting an event upon the entry of UGC meeting relevant criteria), which are filtered to exclude known invalid activity.

Conversion: The point at which a recipient of an advertisement performs a desired action such as a click, opening of a file or email, filling out a form, navigating through to a page or making a purchase.

Earned Media: User (consumer) generated activity based on accessing, watching, listening, reading or otherwise responding to media or a brand/product experience.

Engagement: A spectrum of consumer advertising activities and experiences—cognitive, emotional, and physical. Engagement assumes active participation, but may also describe a cognitive or emotional connection (such as in Social Listening and Monitoring metrics described below), in addition to a physical action.

Imputation: Data relevant to a Social Media measured event that did not originate from a user, but was instead inferred based on other information associated with that event or the user or related users. Imputed data originates from the measurement organization, not the user. Imputation can be a reasonable and accepted statistical process but the associated inferences and data processes should be examined for empirical support.

Influencers: Users with the ability to reach other users or affect other users' thinking in a social online community, generally defined by the number of directly connected users or the size of the network of users associated with an account, user or profile. A person, group or entity with the ability to reach and affect another person or group of people's thinking and behavior due to attributes such as experience, expertise, reputation and social footprint.

Metrics Unit (Word, Sentence, Post, etc.): The measurement base for a consumer listening event. This base should be specified in measurement reports.

Organic: Holistically sourced content created by users and not paid.

Organic Reach: Total unique count of users exposed to content or advertising that includes only those users exposed to content in its original format (within a general feed, ticker, page, etc.).

Owned Media: A media channel that is Owned, and by implication controlled, by a media outlet or brand; for example, a web site, station (radio or television) or app. Owned Media should be defined by the vertical or context of the measurement.

Paid Media: A brand or other marketing organization pays to use an owned media outlet – in general, advertising, messaging or brand sponsorship that appears on owned media. May also be referred to as Sponsored Media or native content.

Potential Reach: Projected Reach (total count of unique users) based on a count of a subset of platform users or a network such as friends, followers or fans. Potential Reach should be limited to use as a planning metric only (not a currency measurement), however, properly disclosed and supported estimated actual Reach may be used as an evaluation metric where appropriate.

Scraping: Harvesting or data extraction whereby software techniques are used to extract HTML, non-API information and content from pages, platforms or other properties.

Sentiment: A view or attitude toward a situation, experience, event, product or brand; an opinion, feeling, sense or emotion expressed by a Social Media user.

Social Media: Created, shared or exchanged information, ideas, and pictures/videos in virtual communities and networks/connections via any tool.

Social Media Platform: A media vehicle, site (as a whole or in part), app, widget or other media mechanism that has a social orientation; specifically, that captures user commentary and facilitates sharing of information among users of a defined network – i.e., representing a channel for sharing information, opinions or experiences from users of that platform – or allows cross-user collaboration.

Sponsored Media: Media influenced by a brand through payment or other incentive, but where the message is not controlled.

Theoretical Reach: Modeled Reach (total count of unique users) based on a gross multiplier of users (such as projecting post-ad delivery based on a gross multiplier representing some estimate of potential exposure). Theoretical Reach should generally be avoided, particularly as a reporting metric.

Threaded Message: A set of communications, entries or events that are related to a common piece of original content.

User Generated Content (UGC): Content that is entered, copied-to, posted (or otherwise created) by users of a Social Media Platform for sharing with others on that Platform. In the context of this document, UGC generally refers to organic (holistically sourced and not paid) content generated by peers or users of Social Media Platforms. Paid/Sponsored UGC is specifically addressed separately within this document. This document excludes “top-down” sources (professional influencers) such as bloggers with topic influence. While blogs are a viable and valid aspect of Social Media and these guidelines can and should be applied to blog measurement, unique aspects of blogs such as content sourcing and subscriptions were not considered herein.

Viral/Earned Reach: Total unique count of users exposed to content or advertising that includes Organic (Earned), but also subsequent exposure resulting from content redistribution (Viral; sharing, re-tweeting, etc.).

2 General Measurement

Social Media Audience Activity

Social Media Audience Activity generally consists of accessing or interacting with and type of content and/or advertising, user actions related to content and counts of certain types or incidences of user-generated content on Social Media Platforms. Social Media Audience Activity may occur through one or more mechanisms such as a browser or a browser equivalent or an application program (an “app”), within a Social Media Platform and should be filtered to remove invalid activity (further discussed below and as defined by the MRC’s *Invalid Traffic and Filtration Guidelines Addendum*). Capturing Social Media Audience Activity, or associated specific events, is the foundation for measurement of Social Media.

In order for a user-action to be considered part of Social Media Audience Activity it should be trackable/measurable (publically or privately), fall within the campaign time period (for campaign level or advertising counting) or defined measurement period and include all valid traffic. Examples of trackable/measurable user-action may include interaction (clicks, shares, re-tweets, likes, favorites, etc.) with Social Media content, application downloads or social shares from a brand website to Social Media Platforms.

Beyond a general definition of Social Media audience activity an array of metrics are produced which result or are derived from this activity. While these guidelines do not seek to define and standardize all possible metrics, the broad Social Media metric categories are presented below with examples of available metrics within each category. Some metrics are specific to a Social Media Platform; however, these guidelines seek to address Social Media activity broadly and generally to preserve relevance of their applicability.

Where applicable and ubiquitous, standard definitions are presented below. Subsequent sections present guidelines with regard to measurement and disclosure, which is intended to apply across this metrics and categories. The specific assignment of metrics to categories below is not meant to be definitive as certain metrics may represent one or more categories, depending on the measured or user entity.

Point In Time Measurement

With the exception of metrics designed to measure user activity longitudinally (as defined below, e.g. duration, completion, etc.) many Social Media metrics involves measurement of counts at a point in time. Social Media is dynamic and fluid and certain

activity discussed further below may either be subsequently deleted or “undone” after measurement of them (such as un-liking, un-following, etc.). Measurers should develop consistent methodologies for counting such metrics at one or more points in time and fully disclose the rules applied, the time period of measurement and the limitations of such techniques in related reporting and methodological disclosures.

Shilling vs. Owned Content and Paid/Sponsored UGC Reporting

Shilling: Good faith attempts should be made by the measurement organization to identify and segregate “shilling”, or paid/incentivized browsing or activity with the express intent to inflate measurement, within Social Media activity and UGC. Such instances of shilling may not be readily identifiable and may be intentionally obfuscated (such as in the case of the use of software to mask the identity of content originators). If a measurer is directly aware of shilling within UGC content, these instances should be removed where known.

Owned Content or Paid/Sponsored UGC

User activity generated from exposure to and engagement with Owned Content or Paid/Sponsored UGC (such as Paid Brand Advocacy or Influencers) is valid. Such activity should be disclosed and segregated in reporting from activity associated with branded content (ads outside of Owned channels) as the nature of the content, the disproportionate involvement of consumers and the impact of the measurement may differ. This includes activity generated from Sponsored/Paid Brand Advocacy or Influencers and the activity of Owned channels and associated user accounts (defined below). The initial (Authorship; defined below) Owned Content or Paid/Sponsored UGC activity should not be counted in reported measurement. However, subsequent exposure to or engagement with this initial activity by other platform users should be reported, but segregated from organic measurement.

Distinguishing In-Feed, Native or Paid/Sponsored Content

Paid/Sponsored content appearing on a Social Media Platform (often referred to as Native or In-Feed) should be clearly labeled in a manner that allows a reasonable consumer to distinguish between what is paid advertising and what is User Generated Content.

2.1 Authorship

The original piece of content or original action unrelated to original content (exposure metrics that measure general use of Social Media Platforms, without engagement) as measured by a platform, publisher or third party such as:

- Completion (page and auto-play video)
- Counts
- Page Visits

Posts¹
Shares (original Authorship such as slide shares)¹
Time Spent Metrics (including auto-play video duration)
Tweets¹
Viewable Impressions

¹: *These metrics may also be used as measures of engagement when present.*

Subsequent Engagement and Reach metrics are directly related to and derived from original Authorship. Authorship metrics should serve as currency, baseline metrics for Social Media measurement.

The MRC and IAB have published certain guidelines applicable to impression measurement across digital media including display, video, rich media and mobile (web and in-app). This document is not intended to supersede those guidelines. Instead, Social Media measurers should apply those guidelines as applicable based on advertising placement type.

Furthermore, the MRC has published guidelines related to viewable impressions, which likewise, should be applied accordingly. It is expected that specific use cases related to impression and viewable impression counting such as mobile viewability, in-feed, in-stream and native advertising measurement will be addressed as updates or addenda to those pre-existing guidelines. It is suggested that Viewable Impressions serve as a baseline currency metric for measuring Exposure on Social Media Platforms.

Finally, various user attributes and data heuristics may be used to further classify exposure metrics as active vs. passive (hovers, scrolls, dwell time, etc.). Such methods should be empirically supportable and any user attributes or heuristics used should be able to be demonstrated to serve as a proxy or indicator for activity or attention.

2.2 Engagement

Generally, per IAB definition referenced below, a spectrum of consumer advertising activities and experiences—cognitive, emotional, and physical. Engagement assumes active participation, but may also describe a cognitive or emotional connection (such as in Social Listening and Monitoring metrics described below), in addition to a physical action.

This document breaks engagement into the following categories: (1) Interaction, (2) Content Redistribution, and (3) Advocacy and Influence. Measurers are encouraged to reference and adopt the applicable general metric definitions (including Engagement) published by the IAB in collaboration with the 4As and the ANA; [Defining and Measuring Digital Ad Engagement in a Cross-Platform World](#):

2.2.1 Interaction

Interaction metrics include measurement of individual user interaction with original content or advertising on Social Media Platforms. Such interactions may be Internal (visible only to the platform or measurement organization), or Public (visible to one or more users of the platform, thereby extending visibility) and include:

Internal:

- Clicks (guidelines exist: [Click Measurement Guidelines](#))
- Completion (post click or initiation)
- Conversion
- Downloads
- Duration (post click or initiation)
- Installs
- Saves (including video “watch later” functionality)
- Swipes
- Taps
- Other actions taken (votes, redemptions, etc.)

Public:

- +1s
- Check Ins
- Comments (Counts or UGC)
- Favorites
- Follows
- Hash tags¹
- Likes
- Mentions¹
- Post
- Pins
- Ratings
- Replies (Counts or UGC)

¹ *Public Interaction metrics such as Hash Tags and Mentions with intent to re-distribute content (where measurable quantitatively or empirically) may also be categorized as Content Redistribution metrics.*

2.2.2 Content Redistribution:

Intentional and direct redistribution or promotion of content or advertising by individual users of Social Media Platforms to other users of Social Media platforms, either individually, to a subset of users (friends, followers, etc.) or across the user base.

Content redistribution by nature is a form of Public engagement. The extent that Public Content Redistribution metrics are compiled that represent one to one visibility (limited to two users) should be clearly defined, labeled and segregated from more widely Public (visible to a network of users or all users) metrics. Where possible, the intent of the interaction (one to one, or more widely Public) should be gauged (supported empirically with consideration to privacy restrictions of the platform) and factored into the measurement methodology.

These include:

- Emailing¹
- Embeds²
- Hash tags
- Linking¹
- Mentions
- Re-blogs
- Re-pins
- Re-posts
- Re-tweets
- Re-vines
- Shares

¹ *Generally considered for emailing or linking from within a Social Media Platform that can be directly measured (as opposed to copying or sharing of links outside of the platform [also referred to as “dark social” activity] where measurement may be limited). Such metrics should be accompanied by clear definition and description of capabilities and limitations.*

² *Embeds, or copying the source code of original content (Authorship) and incorporating or embedding it into sites or platforms other than the platform from which they originated, is a form of Content Redistribution. However, as this action generally involves sites or platforms that may be external from the original platform, measurement of activity associated with embeds outside of the original Social Media Platform may require special disclosure and reporting such as discrete reporting (at the site or platform level) and segmentation from Authorship or direct Engagement.*

The above metrics may also be reported based on depth (iterative or cascading) and alternate platform source or destination (content redistribution between different platforms) with appropriate disclosure and definition. See Section 4.2.2 of this document for further guidance on threaded or overlapping content and downstream editing.

2.2.3 Advocacy and Influence:

Brand Advocacy is activity whereby a user creates favorable content about a brand or product, and then passes on positive messages about the brand to other users. Definition of Advocacy should be consistent and empirically supported based on context of the media being measured (vertical) and the activities generated.

Influencers are users with the ability to reach other users or affect other users' thinking in a social online community, generally defined by the number of directly connected users or the size of the network of users associated with an account, user or profile. Definition of Influence should be consistent and could be empirically supported based on some quantitative measure, usually the top percentile of Reach, connected users (friends, followers, etc.) or activity (interaction or engagement with content).

Influencers may also be a person, group or entity with the ability to reach and affect another person or group of people's thinking and behavior due to attributes such as experience, expertise, reputation and social footprint.

As a result, determination of Influence may also be based on qualitative factors whereby absolute thresholds are more difficult to define. Further the quality of what content or user(s) are being influenced may impact the usefulness of Influence metrics. These factors should be considered when defining and measuring Influence and associated assumptions or limitations of this measurement should be disclosed.

Both Advocacy and Influence can be specific to a media type, brand or platform, but in all cases, the definition and basis should be clearly disclosed with reported metrics and within in methodological descriptions.

Like all other Social Media metrics and as discussed above, measurers should seek to include only Organic or Earned activity associated with Advocacy and Influence. Authorship of content (initial activity generated as part of Owned channels or Paid/Sponsored sites or users) should not be included in reported metrics. However, exposure to or engagement with this activity should be reported on a segregated basis.

Social Listening and Monitoring:

Social Media metrics aimed at measuring qualitative aspects of activity such as:

- Intent
- Opinion
- Semantics (user meaning and relevance)
- Sentiment

Brand Tracking

Social Media metrics aimed at measuring brand performance and health, such as:

- Brand Health Metrics
- Loyalty
- Resonance

While much of the guidance contained within this document may be applied across Social Media measurement in general (including Social Listening and Monitoring as well as Brand Tracking), due to the qualitative nature of many of these metrics, this document is not intended to standardize or mandate definition of engagement with regard to qualitative measurement. Additionally, some Social Listening and Monitoring metrics (such as Brand Awareness and Recall) may be derived from offline surveys (response surveys) as opposed to digital census measurement. Such offline surveys should be subject to certain quality parameters including, but not limited to, the *MRC Minimum Standards*; specifically with regard to sample representation, reduction of bias and sample performance and response rate as well as empirical support of any estimation, data adjustment and modeling).

However, measurers and users of Social Listening and Monitoring as well as Brand Tracking data are encouraged to consider the disclosure guidance contained in Section 7.0 and throughout this document to promote transparency and education around the meaning and use of such measures.

For further guidance on engagement, see [Defining and Measuring Digital Ad Engagement in a Cross-Platform World](#), a document authored by the IAB in collaboration with the 4A's and the ANA related to Making Measurement Make Sense (3MS).

Social Listening and Monitoring or Brand Tracking is generally not projectable to the opinion of all users. The limitations and underlying assumptions of such data should be clearly disclosed. Primary Research may be done to accompany the Social Listening and Monitoring or Brand Tracking to offset some of these limitations..

2.3 Reach

Total unique (deduplicated) count of users exposed to content or advertising. Social Media Reach that includes only those users exposed to content in its original format (within a general feed, ticker, page, etc.) is often referred to as Organic Reach.

Social Media Reach that includes Organic, but also subsequent exposure resulting from content redistribution (sharing, re-tweeting, etc.) is often referred to as Earned or Viral Reach.

Certain Social Media measurers model, impute or project Potential Reach based on the network of those actually exposed to content. Projected Reach based on a count of a subset of platform users or a network such as friends, followers or fans, is referred to as Potential Reach throughout this document. If necessary, Potential Reach should be limited to use as a planning metric only (not a currency measurement). Measurers of Potential Reach may utilize algorithms to divide or segment a network of users into those more likely to be exposed to content. When empirically supported, these divisions of Potential Reach may be utilized, but should be clearly defined and labeled. Properly disclosed and supported estimated actual Reach may be used as an evaluation metric where appropriate.

Modeled Reach based on a gross multiplier of users is often referred to as Theoretical Reach (such as projecting post-ad delivery based on a gross multiplier representing some estimate of potential exposure). Theoretical Reach should be avoided as it may result in unreliable, inconsistent and inaccurate estimates.

Again, MRC and IAB guidelines exist with regard to audience Reach, Furthermore, the MRC intends to establish digital audience-based currency guidelines. While Social Media measurers should apply those guidelines, this document provides further guidance with regard to Reach measurement across Social Media Platforms (see Section 4.1.3 of this document). Valid comparisons of different platform-specific Reach metrics may be performed where these metrics are within the same Reach category and represent the same level of user activity or engagement. Such valid comparisons may be used for reporting relative performance across platforms.

2.4 Cost Metrics

Paid media present within Social Media Platforms may also allow post-level (after consumption or engagement) metrics derived from the cost of advertising placement as compared to other Social Media metrics (exposure, engagement, Reach, etc.), such as:

- Conversions
- Cost per (CPM, CPC, Cost per Engagement etc.)

2.5 Demographics

The above metrics may be reported on the basis of demographic category for general reporting or targeting, which can be obtained or assigned using a number of techniques (registration data, panel or sample based measurement, a combination of direct measurement techniques and modeling or attribution, etc.).

The basis used to measure and report demographic data should be fully disclosed as part of a Description of Methodology and demographic categories should be consistent and clearly disclosed. Relevant standards (e.g., MRC Minimum Standards and Data Integration Guidelines as well as IAB Audience Reach) should be considered when designing and evaluating the demographic techniques used.

Limitations of the demographic techniques and applicable quality or performance metrics (for sample or panel approaches) related to them should be fully disclosed to users of the data. For registration data, collection and update policies should be fully disclosed including if conducted through use of a third party data enrichment provider. Furthermore, organizations utilizing registration information for location are strongly encouraged to develop strong logic checks and inspection techniques and consider existing data collection guidance (e.g., CRE, etc.).

3 Social Media Coverage and Basis for Projection

3.1 Internet/Mobile Internet Users – Universe

It is critical that the impact of reported Social Media measurements be appropriately sized. Sizing is dependent on platform penetration, data collection method and the nature of representation associated with that method. In many cases Social Media measurements should only be reported as gross activity, essentially representing the number of occurrences of a certain condition that were encountered within the platform – for example, projection is not appropriate when only a subset of data is received or collected from a platform across the reporting period.

However, in some cases when data collection methods justify wider sizing, measurements can be projected or indexed to total platform users or internet/mobile/tablet users (as applicable) or to even a wider base, such as total country population.

Furthermore, media type or category sizing should be consistent and clearly defined within platform measurement when utilizing this as a basis for indexing or projection. Sizing and relative measures may also be reported on a weighted or scaled basis as related to the objective or measurement (intended audience or context), with clear and objective definition.

In either case the basis for projection should be specified in reports (or if no projection exists), and the support for this projection method should be specified in the description of methodology of the measurer.

For cross-media comparisons, this guideline requires a total population, or total adult population (depending on Social Media Platform) projection, and not a platform coverage universe. Additionally, valid comparisons of different platform-specific metrics may be performed where these metrics are within the same category (discussed in

Section 2 of this document; e.g. Likes to Favorites to +1s, etc.) and represent the same level of user activity or engagement. Such valid comparisons may be used for reporting relative performance across platforms.

3.2 Compatibility or Measurement Limitations

In cases where the measurer, measurer's measurement techniques or the Social Media Platform's provided data (a direct or periodic data stream provided by the Social Media Platform) is limited to only a sub-set of potential users' activity (for example, not inclusive of certain types of devices, not inclusive of external activity such as emailing or copying links outside of the Social Media Platform (also known as "dark social") or not inclusive of certain types of operating systems, browsers or app versions), these limitations should be fully and prominently disclosed, if material (typically, greater than 5% in aggregate).

Activity captured from partial data streams, for example, data streams not representing the entire user-base of the platform, should be disclosed and appropriately sized.

3.3 Tracking Social Media Exposures Outside of Applications

For Social Media that is accessed outside of an application (regardless of user device) more specifically, when tracking is conducted through a browser or email, it is critical to capture information related to the Social Media Platform for reporting purposes. This will assist in assigning Social Media activity by platform and facilitate the combining of measures across browser or email accessed media with other methods such as apps (which may naturally indicate the platform) or games. Additionally, data should be collected where possible that allows the measurer to deduplicate measurement or determine "uniques" (see Section 4.1.2 for further detail). Gross, unduplicated metrics resulting from logged out activity or that outside of applications should be fully disclaimed.

As discussed in Section 2.2.3, some Social Listening and Monitoring metrics may be derived from offline surveys (response surveys) as opposed to digital census measurement. Such offline surveys should be subject to certain quality parameters including, but not limited to, the *MRC Minimum Standards*; specifically with regard to sample representation, reduction of bias and sample performance and response rate as well as empirical support of any estimation, data adjustment and modeling).

3.4 Social Media Applications

Social Media applications (apps) come in numerous forms, but essentially they represent closed logical environments with specified controls and functionality where the user can access and generate Social Media content.

The IAB, MRC and another association, the MMA (Mobile Marketing Association), have produced a guideline for the measurement of advertising in an application environment.

While this guidance generally applies to ad impressions, the Social Media measurer that conducts business in application environments should consider the provisions contained in this guideline. The following are some key aspects to consider (slightly modified from the In-App Guideline so they apply to the Social Media environment):

Physical and Logical App Environment

Physical attributes of the advertisement, Social Media event or UGC space analyzed, and the placement of these within the application should be disclosed; this disclosure can be made as part of initiating the measurement product with the media outlet, advertising agency or buyer. Additionally, any variable exposure attributes such as ad size of the advertising during the application session or the UGC opportunities involved should be described. Measurement events should not be counted if occluded or otherwise exposure, sharing or distribution is impaired in a significant manner. Event based Social Media instances should be described in terms of attributes and trigger criteria.

The Social Media measurement organization working with apps (including games) should have sufficient controls or assurance to determine that:

- The application was downloaded, opened and initialized as designed on that Client User prior to the measured Session.
- The application itself was functioning as intended during the session. Social Media activity associated with “faulted” conditions (situations of functionality issues with the application, errors or non-working conditions) should be tracked and segregated from activity in fully functioning environments.

Measurement Conditions within the App

Changes in page orientation during application use can be tracked as a native or SDK function, however, this generally does not alter the parameters for counting Social Media activity, except to the extent it may change the size of UGC or relevant text (for example, which may cause viewable parameters to be more or less difficult to achieve).

Instances where users are encountering application-loading screens are generally not counted as application activity, nor are the loading duration considered in-app duration. In certain instances these loading screens can contain advertising messages or Social Media relevant content. In general, these impressions or any other measured activity associated with loading screens (e.g., duration, mouse activity, etc.) should be segregated for reporting purposes from actual application use and advertising consumed during the application’s user experience.

Measurement Orientations with an App

Application transaction records, which contain evidence of Social Media exposure or relevant Social Media events, can be derived and transmitted to the application

measurement organization: (1) on a real-time basis during application execution, (2) in batched groups that are transmitted periodically (in whole or in part) during an on-line application Session or, (3) first stored during off-line application use and later transmitted during a subsequent on-line Session (not necessarily associated with the same application) of the applicable Client-User.

In situations where the connection speed of the client-user can impact counting effectiveness, scraping effectiveness or the counted activity itself, the application developer or SDK developer, if applicable, should make reasonable efforts to ensure counting is accurate. Editing and error handling rules should be developed to detect, segregate and report counting situations with suspect accuracy related to connection speed.

Controls within Apps Originated by the Measurer (or Relied-On by the Measurer)

The general internal controls present at the organization that develops or approves the application for release are a critical component of the overall operating effectiveness of measurement associated with the application. These controls do not have to necessarily reside at the original application development/programming facility; however, certain levels of quality control should be present at some stage of application rollout. Ultimately, it is the responsibility of the Social Media measurement organization to ensure that proper testing and release processes are followed and that controlled development processes were employed in building the original application.

In general, the Social Media measurement organization that relies on apps should have sufficient controls to ensure:

- Development of and changes to applications are authorized, tested and approved prior to being rolled out for User download (release). Segregation of versions should be maintained where measurement functionality has been changed.
- Access to application software associated with advertising or UGC scraping/capture, storage of ads, ad or UGC placement and serving functionality is restricted to authorized personnel (non User) and programs. Users should not have the ability to app functionality in this area.
- User-set parameters that relate to measured events are documented, recorded and included in data transmissions back to the measurement organization if changed.
- The application is documented, and measurement associated functionality is documented.
- Only authorized formatted content is accepted as input by the application, regardless of whether that content is entered real-time or stored for later use.
- Any calculations or data accumulation processes within the application have been tested for efficacy.
- Data transmissions from applications (whether real-time or batched) are complete, accurate and protected from modification.

- Errors and measured-event related data rejected for quality purposes is logged, evidence supporting the error is retained and errors are followed up on to correct potential cases of systematic or recurring issues.

In SDK oriented measurement environments, the application developer or seller should have sufficient confidence that the above controls are maintained for the SDK functionality. Development of this confidence can encompass a periodic review and/or testing conducted by the application developer, in which case the application developer then is taking responsibility for the controls at the SDK developer. Another approach is for the SDK developer to be audited by a third party with some form of observable assurance provided such as certification, accreditation or a third-party CPA attestation. In this latter case, if the application developer is looking to become certified or accredited, the auditing organization can build a case for relying of the SDK provider's assurance (depending on conditions of that assurance).

Provided Data Streams versus In-App Measurement

In some cases, measurement organizations will receive data directly from the Social Media Platform in either a real-time or batch environment such as via an API or fire hose data. This necessitates a different analysis workflow and level of integration (lesser integration) from those measurement functions that are integrated with or into the application itself – collecting data directly – which are described above.

In situations where data is received directly from the Social Media Platform, other controls apply. Specifically the measurement organization should have controls that ensure:

- An understanding of the processes used to create the transferred data.
- An understanding of the meaning of the data fields transferred.
- Completeness of the data transferred, and continuous time-periods from transfer to transfer.
- Data checks for logical consistency and appropriate field contents.
- Back-up and recovery processes for transferred data.
- An understanding of the completeness of the data transferred, and if incomplete or a subset the nature of the missing data.
- For real-time collection processes, processes that ensure transfer completeness in the event of lost connections.

Mobile Viewability

As discussed above, the MRC has published guidelines related to desktop viewable impressions, which should be applied accordingly. It is expected that specific use cases related to impression and viewable impression counting such as mobile viewability, in-feed, in-stream and native advertising measurement will be addressed as updates or addenda to those pre-existing guidelines. However, the desktop viewability guidelines do not directly address mobile viewability (web or in-app).

The MRC intends to publish guidelines specific to viewability measurement in mobile environments. Likewise, it is expected that Social Media measurers consider these guidelines for viewability measurement of Social Media in a mobile environment.

3.5 Usage Restrictions, If Any

Usage restrictions with Social Media data that impact measurement or groups to be measured should be fully disclosed and if possible, quantified. A relevant example of this would be age restrictions or other limitations for participation by minor persons (or other demographic information/origin of user) such as COPPA restrictions.

4 Social Media Activity Measurement Specifics

4.1 Tracking of Users Accessing Content – Technical Details

Example: Quantifying users accessing or otherwise potentially influenced by Social Media UGC, postings or other events.

4.1.1 Client Side (and Viewable):

All user tracking associated with Social Media measurement should be measured based on client side activity or actual user events from user devices, filtered to exclude known invalid activity and insofar as applicable viewable events only should be counted.

4.1.2 Tracking Method

The specific tracking method and counting assets used by the Social Media measurement organization should be fully disclosed in the description of methodology and may include, but are not limited to:

- Ad/Asset Tags
- Communication Based Measurement (Redirects)
- Online or Offline Surveys
- Page Implementations
- Player Plug-Ins
- Scripts

Specific machine based tracking of users – such as unique browsers or cookies – should be specified and distinguished from actual user based tracking (which requires more advanced adjustments, registration, etc.).

De-duplication of user tracking (into “uniques”) for reach measurements is desirable – but is recognized to be a difficult metric to capture accurately. If a measure is labeled “unique” de-duplication is required. It is critical that thorough

descriptions of how “users” are actually determined and how de-duplication during measurement periods is accomplished are provided to users of unique user measurements.

Tracking methods should be subject to internal testing and validation upon original implementation as well as periodic internal verification testing. Tracking methods and disclosures will be the subject of intense procedural verification if external certification is sought by the measurement organization.

4.1.3 Projection or Other Estimation Methods, Including Inferences

Projection, imputation or other data adjustments made to tracking measurements by the Social Media measurement organization shall be fully described, based on systematic and reasonable procedures and should be supported by underlying empirical studies. As a general rule, activity should not be attributed to a Social Media user without direct evidence of such activity such as assumptions of activity or fans/followers or Theoretical Reach multipliers. Social Media measurers and researchers are encouraged to publically circulate relevant research supporting any assumptions in this context, which can be compiled and linked to as part of future iterations of this document.

Readers or access to content should not be assumed based on mere users of a platform; actual transactional evidence of content consumption should be used as a basis for measurement. Inferences based on brand specific subsets of the total user population (fans or followers) should not be applied to the total population. Such inferences should also be disclosed.

Baseline metrics utilized for Organic and Earned Reach should be clearly disclosed and consistent across media categories and types within a platform.

If necessary, Potential Reach could be used as a planning metric (not a currency measurement), but should be limited to planning circumstances only and the basis for such measurement as well as the inherent limitations should be fully disclosed. Measurers of Potential Reach may utilize algorithms to divide or segment a network of users into those more likely to be exposed to content. When empirically supported, these divisions of Potential Reach may be utilized, but should be clearly defined and labeled. However, properly disclosed and supported estimated actual Reach may be used as an evaluation metric where appropriate.

Theoretical Reach in general should be avoided for media planning or buying. If present for directional analysis (non-transactional and non-currency), the basis for projection used in Theoretical Reach should be fully disclosed and disclaimed as well as supported based on systematic and reasonable procedures and underlying empirical studies. Furthermore, underlying model assumptions should

be fully described. Gross multipliers used for deriving Theoretical Reach without empirical support should not be used for any purpose.

See Section 4.4 of this document for guidance with regard to frequency capping that may impact Reach metrics.

4.1.4 Metrics and Key Attributes

Metrics and definitions of attributes of key metrics shall be disclosed by the Social Media measurement organization. Important metric definitions should appear on or within easy access from the reports containing the measurement data. Measured units, for example, viewable impressions or views of UGC or other actions (for example, “likes”) should be defined and should conform to common industry accepted definitions to the fullest extent possible.

4.1.5 Differences by Platform

Any differences in processes or measurement methodology by Social Media platform shall be disclosed. This is a relevant issue when estimates or comparisons are reported across Social Media platforms or when the measurer combines platforms.

4.2 User Generated Content (UGC) Analysis – Technical Details

Example: Sorting through or analyzing UGC, generally using machine-based processes and learning, to find brand mentions or other events considered meaningful, and seeking to determine the context and sentiment of the content of the post. Also, determining context and meaning of subsequent threaded postings.

In addition to the guidelines in section 4.1 above (which should be applied to Social Media measurement based on UGC), the following additional considerations should be considered:

4.2.1 Tracking Method

The specific collection method and word or content recognition processes used by the Social Media measurement organization should be fully disclosed in the description of methodology and may include, but are not limited to:

- API
- Direct Measurement
- Machine Learning
- Offline Export
- Partner Data
- Scraping
- Third-Party Tracking

Specific machine based processes (and learning functions) for gathering of UGC words or keywords, number of mentions or events should be disclosed.

Data collection methods should be subject to internal testing and validation upon original implementation as well as periodic internal verification testing. This testing should include the validity of the context and sentiment measures. Data collection methods and disclosures will be the subject of intense procedural verification if external certification is sought by the measurement organization.

The content source should be clearly defined and scoped in the measurement service's disclosures, for example:

- What type of content is captured from what platform
- User coverage for measured platforms
- Collection method (direct, API, offline export, partner, third-party, scraping, etc.)
- API type where applicable (public, closed client, platform or fire hose)
- Depth of content collection (scraping) applied
- Storage methods, timing
- Nature of machine (or human) analysis processes employed
- Time periods analyzed
- Edits or data adjustments applied
- Nature of special handling of ambiguous cases
- Error correction and reissue procedures
- Sentiment accuracy

4.2.2 Threaded Content, Overlapping Content and Downstream Editing

Engagement metrics may also be reported based on depth (iterative or cascading) and alternate platform source or destination (content redistribution between different platforms) with appropriate disclosure and definition.

Tools for analyzing and accumulating threaded content shall be disclosed, and these tools will be subjected to extensive internal quality control testing by the measurement organization – especially when linkages of threaded content are not clear (for example, situations where sequential follow-on lists are not used).

Duplicate or overlapping content processes should exist that minimize/eliminate double or multiple counting of single events.

Changes made to UGC by original posters or others should be distinguished where possible by the measurement organization.

Default ordering (most recent, most relevant, etc.) of UGC in threads or feeds as configured by a platform or measurer (as opposed to user-configured ordering) should be disclosed. Additionally, algorithms employed by Social Media

Platforms to either other the content users see or suggest content should be empirically supported and the use of such techniques should be disclosed as part of measurement and reporting. Changes to this ordering or the underlying algorithms should be disclosed in advance for transparency and trending purposes where possible.

Finally, the presence and prevalence of user-configured ordering may impact measurement and should be studied and considered by measurers of platforms where present.

4.2.3 Excluding Non-Relevant Information

The measurement organization may exclude non-relevant content (based on keywords, subject matter or other contextual measures) from measured events. Contextual relevance may be subjective and vary between platforms. As with any data adjustment techniques, any processes to determine the relevance of and exclude or include content for measurement should be fully described, based on systematic and reasonable procedures and should be supported by underlying empirical studies.

Measurers are encouraged to develop robust dictionaries or taxonomies that are consistently applied for the purpose of establishing contextual relevance. Alternatively or additionally, machine learning or algorithmic approaches are permissible if supported by empirical analysis, consistently applied and periodically updated.

Similar to Ad Verification guidance, Social Media UGC contextual relevance parameters should be developed through consultation between the platform or measurer and the customer. Contextual relevance criteria should be maintained by each measurer and clearly disclosed to customers

Timing of UGC

The timing of the contextual relevance determination or underlying data assumptions should be disclosed relative to the timing of the UGC analyzed (“freshness”) and a measurer should have stated data staleness policies empirically supported. It is strongly encouraged that measurers analyze the degree of user activity associated with types of UGC longitudinally as a basis for freshness or staleness policies. A time stamp is recommended to inform users about the age of the service’s most recent assessment.

Empirically supported reporting time cut-off edit rules are strongly encouraged, with full disclosure, especially with regard to measurement of Social Media activity related to a specific advertising campaign. Reporting cut-off rules should consider the nature of the posts (e.g., Sponsored evergreen posts) and

campaign time bounds (where applicable) as well as if the activity being measured relates to original Authorship or re-posting of original Authorship.

Measurers may utilize customizable time cut-off reporting or UGC age segmentation where clearly defined and reported with transparent methodology.

In situations where activity is measured related to re-Authorship of original content and cut-off rules are applied separately, reporting should be segregated from that of activity related to original Authorship.

4.3 Video

Measuring Accesses to Social Media Event Data

When measuring access to Social Media on video, or User Generated Video, the requirements associated with conventional video measurement apply. Video access should be counted using a client-side technique only when the specific Social Media content is encountered (if it is not represented in the entire video execution), in the viewable area of the screen, post caching.

Video access can be measured using several types of metrics:

- Video Ad Impression (served) – This metric represents the count of the first frame of the video ad, post buffering if applicable. This is no longer considered a currency metric.
- Video Ad Impression (Viewable) – Generally 50% or more of pixels in view for at least 2 continuous seconds (as well as other requirements of the viewability guidelines) is required for video in a desktop environment. This guidance may be replaced or superseded by additional guidance promulgated by the MRC with regard to mobile and stream/feed environments.
- Various metrics can be used to measure progress through either the video or the application content (completion, quartiles, percentage, retention, view-through rate, cost per time metrics, etc.), which can act as a surrogate to user interest or engagement at a basic level.
- Various metrics can be used for user interactions with the video or the application content, which again can act as a surrogate to user interest or engagement – for example, swipes, taps, movement or hovers, etc.

Analyzing UGC Video

Analyzing and understanding the content and sentiment within user-generated video is highly relevant to this guideline. Several general principles, some of which are described in section 3 of this document, apply:

- Verification of the user-generated (Earned) status of the video, as distinguished from Paid media (see Section 2.0 for further guidance on the segregation in reporting of Owned Content and Paid/Sponsored metrics).

- Evaluating the entire string of content, rather than a sample. If sampling is employed, specific parameters should be disclosed.
- Ensuring that user generated video content is not analyzed more than once for a measured metric – this can be complex given duplication and/or multiple copies or partial copies that can reside within platforms (see section 3.3).
- Applying a consistent, transparent (disclosed) set of overall qualification criteria, search terms and context evaluation rules.
- Applying manual-intervention when machine learned decision rules encounter ambiguities or where significant doubt exists as to true context.

4.4 Advertising Measurement on Social Media and Applications

Pure measurement of advertising impressions (served or viewable) within Social Media web-based or app-based environments are governed by other previously promulgated guidelines. Specifically, the IAB/MRC Impression Measurement Guidelines and Viewable Impression Guidelines as well as the IAB/MRC/MMA In-App Advertising Measurement Guidelines are applicable for these measurements.

However, in certain situations, social platforms may enforce frequency capping, or a limitation of the number of ads that may be served either to the total user population or a subset of users (such as users outside the network of a specific brand). Such a parameter may either be enforced by default of the platform or as configured by a brand or other entity serving ads on the platform. Such limitations of exposure or Reach should be fully disclosed to users of the platform in the context of reported metrics where possible.

5 Enhancing Social Media Measurement Accuracy

Note: Most of this section is applicable to tracking or counting Social Media user exposures, rather than UGC content analysis.

5.1 Cache Busting

In certain situations, Cache Busting techniques should be employed by Social Media measurement organizations to minimize undercounting of Social Media activity, if that activity is related to impressions, web-page calls or user accesses. Cache Busting techniques are applied by sites or ad-serving entities and consist of HTTP header controls and/or random number assignments applied to transactional information to make them unique from other events so they are not suppressed for counting purposes.

5.2 Filtration for Known Invalid Activity

All metrics subject to audit by MRC or certification auditors are expected to comply with the MRC's *Invalid Traffic and Filtration Guidelines Addendum*. This includes Social Media metrics, which should be filtered for known General Invalid Traffic as required by those guidelines. Furthermore, like other metrics, application of Sophisticated Invalid Traffic detection processes are strongly encouraged for Social Media metrics. Such Sophisticated techniques may be further enabled in a Social Media data collection environment and platforms are encouraged to extend these techniques to robust account and user validation procedures.

However, while Social Media Platforms or UGC collectors may have the ability to utilize granular data to conduct General and Sophisticated Invalid Traffic detection, third-party aggregators or users of API and fire hose data may be limited in their visibility into granular data and therefore limited in their ability to filter. In situations where such parties utilize data from upstream platforms or UGC collectors with accredited filtration techniques, this should be confirmed and disclosed by the aggregator with no further requirement for additional filtration. However where such accredited upstream filtration techniques are either not present or unknown, such parties should make reasonable efforts to either obtain platform data that allows them to comply with these guidelines or perform additional downstream analytical procedures to serve as a proxy for more granular analysis.

5.3 Segregation of Pre-Fetch Activity

Events that occur because of non-user-initiated pre-fetch tools should be segregated for Social Media measurement reporting purposes and appropriately described so the users of measurement data are informed of specific origins.

5.4 Auto-Play Content (Ads/Video), Other Non-User Intended Content

Valid, measured Social Media events can include those where the underlying activity was either user or auto initiated, however an auto-initiated event based on social events should be segregated and described for reporting purposes.

Additionally, if a measurer has knowledge that a user event occurred in an unintended manner, through tricking, misdirecting or masking true locations, these events should not be counted in reported events.

5.5 Applications – On-Line vs. Off-Line Activity

In an application-based platform pertaining to Social Media, activity can be conducted on-line or off-line (off-line activity is posted, updated and/or measured upon the user re-

engaging on-line). All of these events can be legitimately measured but the existence and nature of off-line events should be described in reports of Social Media measurement. In general, it is desirable to disclose the percentage of measured events that occurred off-line.

The passage of time can make off-line events less valuable, so excessive amounts of delay in re-engaging on-line (for example, those where prior on-line exposure was prior to the reporting period) should be quantified and disclosed.

5.6 Inactivity Considerations and Limits

We refer the user of this guideline to prior IAB guidance on Audience Reach Measurements where the term “Session” is defined. This guidance indicates the determination of a single continuous set of activity attributable to a browser or user can involve making assumptions about user activity and is subject to measurement limitations such as dynamic IP addressing and cookie deletion. Measurement organizations should consider these difficulties when creating rules for determination of sessions/visits. Social Media behavior may support Session determination and definition different than general Internet behavior and measurers are encouraged to study and support any alternate definitions.

In measuring sessions, it is generally necessary to terminate sessions if certain periods of inactivity are encountered for a user. If the Social Media measurement relies on identifying users, unique users or sessions, we believe this guidance is highly relevant and required.

6 General Reporting Parameters

6.1 General Parameters

General reporting parameters (dayparts (and more granular time), weekparts, time zones, etc.) provide for consistency and comparability. These should be based on the logical application of information about the usage patterns of the medium.

In order to provide for more standardization in Social Media measurement reporting, the following general reporting parameters are recommended. Note that these are only several of the possible reporting parameters that may be used. If parameters in addition to these are reported, similar rules should be defined and applied.

6.2 Time

Day — 12:00 midnight to 12:00 midnight

Dayparts — Social Media usage patterns need further analysis to determine the usefulness of establishing effective and logical standardized reporting dayparts. We

encourage such analysis to determine the need for standardization of this measurement parameter.

To the extent that Social Media measurement is specific to a media vertical (e.g., TV), measurers are encouraged to conform to existing and standardized dayparts, especially with regard to cross-media comparisons or GRPs. However, it is likely that media-agnostic measurement will need to be further studied to determine traffic and usage patterns. Social Media specific dayparts should be supported by empirical traffic analysis. Custom dayparts should be fully disclosed.

Time Zone — Full disclosure of the time zone used to produce the measurement report is required. It is preferable, although not a current compliance requirement, for certified publishers or ad servers to have the ability to produce measurement reports in a consistent time zone so buyers can assess activity across measurement organizations. For US-based reports it is recommended that reports be available on the basis of the Eastern Time zone, for non US-based reports this is recommended to be GMT.

Week — Monday through Sunday

Weekparts — M-F, M-Sun, Sat, Sun, Sat-Sun

Month — Three reporting methods: (1) TV Broadcast month definition. In this definition, the Month begins on the Monday of the week containing the first full weekend of the month, (2) 4-week periods – (13 per year) consistent with media planning for other media, or (3) a calendar month. For financial reporting purposes, a month is defined as a calendar month.

6.3 Location

6.3.1 Traditional Geo-Location Methods

If information about the geographic location of the users is collected using traditional geo-location methods (for instance, using registration information or IP-based data from a third-party vendor to determine the location of the user), and this information is used in reporting, any limitations to the methods used should be disclosed. Ambiguities in wireless operator routing should be accounted for in location determination and estimated through processes derived from carrier/ad server cooperation.

For registration data, collection and update policies should be fully disclosed. Furthermore, organizations utilizing registration information for location are strongly encouraged to develop strong logic checks and inspection techniques and consider existing data collection guidance (e.g., CRE, etc.).

6.3.2 Application Location Services

If information about the geographic location of the users is collected using application location services (such as GPS-enabled user location determination, device fingerprinting or another application-based means), and this information is used in reporting, the method used and any known limitations to it should be disclosed.

To the extent that platforms or measurers utilize both traditional geo-location methods and application location services, discrepancies between these approaches should be reconciled with significant conflicts addressed.

6.3.3 Hybrid and Emerging Location Techniques

Certain hybrid and emerging techniques for location assignment and detection are either currently present or being developed, including advanced techniques involving location mapping and proximate points of interest. Such techniques should be disclosed in detail along with inherent limitations and coverage when utilized by Social Media measurers or platforms.

6.4 Segregating Non-Like Ad Content or Activity

For reporting purposes, measurements should be segregated by the various types of ads, UGC or events included in the campaign. For instance, counts should be reported separately for ads within the campaign of different sizes or functionalities, different brands, different brand sub-components, etc.

7 Disclosure Guidance

7.1 General

Social Media measurement organizations should fully disclose their Social Media activity recording process to buyers and other users of the measurement data. An organization's methodology for accumulating Social Media advertising measurements should be fully described to users of the data. Specifically, the nature of measurements, methods of sampling used (if applicable), data collection methods employed, data editing procedures or other types of data adjustment or projection, calculation explanations, reporting standards (if applicable), reliability of results (if applicable) and limitations of the data should be included in the disclosure.

See Section 4.2.1 for further guidance. Platforms and measurement organizations should disclose these details to users of the data via a Description of Methodology, updated at least once annually.

The following presents examples of the types of information disclosed.

Nature of Social Media Measurements

- Name and Type of Application Included in the Measurement
- Name of Measurement Report
- Type of Measurements Reported
 - Time Periods Included
 - Days Included
 - Basis for Measurement (Measurement Unit)
 - Geographic Areas
 - Significant Sub-Groupings of Data
 - Demographic categories
- Formats of Reported Data
- Special Promotions Impacting Measurements
- Nature of Auditing Applied and Directions to Access to Audit Report
- Sampling/Projections Used
 - Sampling Methods Used
 - Explanation of Projection Methods

Data Collection Methods Employed

- Method of Data Collection
 - Logging Method
 - Logging Frequency
 - Logging Capture Point
- Types of Data Collected
 - Contents of Log Files
- Contacts with Users (if applicable and allowable considering privacy)
- Research on Accuracy of Basic Data
 - Cookie Participation Percentages (if applicable)
 - Latency Estimates
- Rate of Response (if applicable)

Editing or Data Adjustment Procedures

- Checking Records for Completeness
- Consistency Checks
- Accuracy Checks
- Rules for Handling Inconsistencies
- Circumstances for Discarding Data
- Handling of Partial Data Records
 - Ascription Procedures

Computation of Reported Results

- Description of How Estimates are Calculated
 - Illustrations are desirable
 - Frequency caps enforced impacting ad or Reach metrics
- Weighting Techniques (if applicable)
- Verification or Quality Control Checks in Data Processing Operations
- Pre-Release Quality Controls
- Reprocessing or Error Correction Rules

Reporting Standards (if applicable)

- Requirements for Inclusion in Reports, Based on Minimum Activity Levels

Reliability of Results

- Sampling Error (if applicable)

Data retention rules

- Maintaining sufficient data or processes that allow for audit trail

Limitations on Data Use

- Non-sampling Error
- Errors or Unusual Conditions Noted in Reporting Period
- Limitations of Measurements

7.2 Data Ownership Disclosures

Users and measurers of Social Media data should clearly disclose any applicable data ownership requirements or policies as part of both contractual arrangements and methodological disclosures. Social Media measurers or platforms should promote formal transparency surrounding data derived from user activity on measured platforms and any related user privacy policies via disclosure within a Description of Methodology. Users of Social Media data and clients of Social Media Platforms or measurers (including advertisers, agencies and publishers) are encouraged to incorporate terms and clarification regarding data ownership into contractual arrangements, terms of service or transaction stipulations in advance.

8 Auditing Guidelines

8.1 General

Third party independent auditing is encouraged for all Social Media measurements used in the buying and selling process. This auditing is recommended to include both counting methods and processing/controls as follows:

1. **Counting Methods:** Independent verification of activity for a defined period. Counting method procedures generally include a basic process review and risk analysis to understand the measurement methods, analytical review, transaction authentication, validation of filtration procedures and measurement recalculations.
2. **Processes/Controls:** Examination of the internal controls surrounding all phases of the measurement process. Process auditing includes examination of the adequacy of applied filtration techniques. Although audit reports can be issued as infrequently as once per year, some audit testing should extend to more than one period during the year to assure internal controls are maintained. Audit reports should clearly state the periods covered by the underlying audit testing and the period covered by the resulting certification.

8.2 U.S. Certification Recommendation

All Social Media measurement applications used in the buying and selling process are recommended to be certified as compliant with these guidelines, at minimum annually. This recommendation is strongly supported by the 4As and other members of the buying community, for consideration of measurements as “currency.”

Special Auditing Guidance for software providers that market Social Media measurement software to Social Media Platforms or publishers for use on the publisher’s IT infrastructure (i.e., “outsourced”) should consider the following additional guidance:

1. The standardized measurement software should be certified on a one-time basis at the measurement organization, and this certification is applied to each customer. This centralized certification is required at minimum annually.
2. Each customer’s infrastructure (and any modifications that customer has made to the measurement software, if any) should be individually audited to assure continued functioning of the software and the presence of appropriate internal controls. Processes performed in the centralized certification applicable to the outsourced software are generally not re-performed. The assessment of

customer internal controls (and modifications made to outsourced software, if any) is also recommended to be at minimum an annual procedure. These certification procedures are only necessary for outsource clients who wish to present their measurements for use by buyers.

Special Auditing Guidance for Advertising Agencies or Other Buying Organizations

If buying organizations modify or otherwise manipulate measurements from certified Social Media measurement organizations upon receipt, auditing of these activities should be considered.

In addition to MRC and its congressional supported certification process for the broadcast industry, there are a number of other certifiers and types and levels of certification available to ad serving organizations.

9 Who We Are

About the Media Rating Council (MRC)

The Media Rating Council is a non-profit industry association established in 1963 comprised of leading television, radio, print and digital media companies, as well as advertisers, advertising agencies and trade associations, whose goal is to ensure measurement services that are valid, reliable and effective. Measurement services desiring MRC accreditation are required to disclose to their customers all methodological aspects of their service; comply with the MRC Minimum Standards for Media Rating Research as well as other applicable industry measurement guidelines; and submit to MRC-designed audits to authenticate and illuminate their procedures. In addition, the MRC membership actively pursues research issues they consider priorities in an effort to improve the quality of research in the marketplace. Currently approximately 100 research products are audited by the MRC. Additional information about MRC can be found at www.mediaratingcouncil.org.

About the American Association of Advertising Agencies (4A's)

The 4A's is the catalyst for bringing together the right people in the right place at the right time to address the advertising industry's most critical business issues. They provide leadership, advocacy, guidance and community to their members and the industry at large, with proprietary access to the people, information and tools needed to make smarter management decisions. Their mission is to help agencies become more successful.

The 4A's Social Media Committee, an agency-led senior executive committee of the 4A's, was formed in 2013, and is dedicated to defining and driving best practices for social media marketing and advertising. Their goal is to act as a resource and thought-leader for the social media practice inside agencies and inspire, recognize and develop future talent.

About the Interactive Advertising Bureau (IAB; U.S.)

The Interactive Advertising Bureau (IAB) empowers the media and marketing industries to thrive in the digital economy. It is comprised of more than 650 leading media and technology companies that are responsible for selling, delivering, and optimizing digital advertising or marketing campaigns. Together, they account for 86 percent of online advertising in the United States. Working with its member companies, the IAB evaluates and recommends standards and practices and fields critical research on interactive advertising. The organization is committed to professional development, elevating the knowledge, skills, and expertise of individuals across the digital marketing industry. The IAB also educates marketers, agencies, media companies and the wider business community about the value of interactive advertising. Founded in 1996, the IAB is headquartered in New York City. For more information, please visit www.iab.net.

About the Word of Mouth Marketing Association (WOMMA)

The [Word of Mouth Marketing Association](http://www.WOMMA.org) (WOMMA) is the official trade association for the word of mouth and social media marketing industries. Founded in 2004, WOMMA is the leader in ethical word of mouth marketing practices and offers online and offline education, professional development opportunities, and knowledge sharing with top industry marketers. WOMMA's membership is made up of the most innovative companies committed to advancing the word of mouth marketing industry through advocacy, education, and ethics. For more information, visit www.WOMMA.org

10 Contact Us

Contact Information

For questions related to the content of this guideline, please contact:

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