

A Media Measurement White Paper

JICs, Joint Industry Committees & MOCs, Media Owner Committees – Ten Cornerstones

Tony Jarvis, Olympic Media Consultancy, USA

John Grono, GAP Research, Australia

With special acknowledgment to our international colleagues worldwide

V1.05 March 20, 2024

CONTENTS

	Pages
Introduction	3
Background	4-5
Origins of JICs	6
The 10 JIC/MOC Cornerstones	7-20
Benefits of JICs	21
The Long-Term Future of Media Currencies & evolution of JICs/MOCs	22
Conclusions	23
The Authors - Contact Details	24

Introduction

The trading currency for any advertising medium in many major countries around the world is typically developed, managed and marketed by either a Joint Industry Committee, JIC, or a Media Owner Committee, MOC. A media's trading currency is usually based on highly refined audience exposure research and measurement of the medium.

JIC & MOC organizations represent a standard for a consensus-based business structure and process that establishes a media trading currency (singular) for each medium measured. Some have been in existence for many years.

Globally JICs & MOCs reflect massive annual investments in ever more complex media research approaches. In reviewing the key values, principles, and requirements of various JICs & MOCs worldwide, it's clear that there is no definitive document that provides their current core operational structure, principles and parameters.

It's genuinely hoped that this White Paper brings a comprehensive understanding of the role, operational parameters, principles, and values of JICs & MOCs in media currency research worldwide.

Consequently, we hope this White Paper will explain how and why these unique industry collaborative research operations, that underpin \$billions in ad spend globally, work well.

This Paper is intended to be a living document that will continuously be polished and enhanced based on best operational practices and further expert input. It isn't intended to mandate what "*must be done*" or provide a detailed roadmap that "*has to be adhered to*", but rather identify the key parameters of a better approach to a better and more flexible cost-effective media currency system - a pathway to success. The authors believe these operational principles are flexible enough to be applied in any market.

Background

The “Ten JIC Cornerstones” identified in this White Paper have evolved from years of experience in many countries for many major media that ultimately have provided a single, agreed trading currency for the medium managed by a representative multi-partite independent Joint Industry Committee, “JIC”, or a media owner dominated multi-partite Media Owner Committee, “MOC”, acting on behalf of media buyers, sellers, and advertisers.

While today each country’s media JIC or MOC may reflect some nuances on these cornerstones, based on dialogue with many international media research experts and a subsequent peer review, it is believed that this White Paper represents the core principles, requirements and values for any organization that is entitled to label itself as a “JIC” or “MOC”.

The authors suggest that using this hard-earned, globally defined and acknowledged term when its established values, principles and requirements are known and not embraced is deceitful.

The motivation for this White Paper came from a recent claim, by a US TV/Video audience measurement alt-currency major TV network “consortium”, which includes some global media agencies, that it is operating as a “JIC” rather than what it is – a Multi-Currency Certification Committee, M-CCC.

JIC’s and MOCs deliver a **single** trading currency for a medium. Notably this new US industry “Certification” group is being “managed” by OpenAP which is a for-profit business whose primary products are ad targeting and media measurement. OpenAP is owned by the TV networks. It is also a vendor/contractor to the companies submitting a variety of alt-currencies for certification. OpenAP’s ownership and management role are obvious conflicts of interest. All these elements are contrary to established JIC practices and procedures.

The so-called US “JIC” is also clearly not a MOC, Media Owner Committee, as the MOC model is overall structurally the same as the general JIC model as described in this White Paper. The key difference being that both Advertisers and media agencies are typically not MOC shareholders and also do not have ultimate control.

Therefore, this US M-CCC is neither a JIC nor a MOC.

JICs, Joint Industry Committees & MOCs, Media Owner Committees – Ten Cornerstones

In these circumstances it was deemed timely that an update of the values, principles, structure, and requirements of JICs and MOCs worldwide was published.

When the principles and values of JICs/MOCs are understood and embraced there are real benefits for the media and advertising ecosystem. Pragmatic decisions deliver significant cost efficiencies and reliable agreed metrics via a single trading currency for any medium.

Origins of JICs

According to Barb Audiences, the UK JIC, the origins of JIC principles were established in the UK in 1931 when the advertisers, led by the forerunner to ISBA, joined forces with newspaper publishers to establish The Audit Bureau of Circulations, ABC.

The “modified JICTAR type of service” parameters for measuring “what people watch” were established in April 1978 with a development target date of July 1979. They were driven by the Independent Television Companies Association Ltd. in collaboration with the BBC, each of which had their own measurement system up to that point. The organizational approach and principles established were “approved” by the Secretary of State for the Home Department.

The cornerstones outlined at the time were:

- Avoiding disparate audience claims.
- A joint Board to arrange funding and management.
- Meeting the full requirements of advertisers.
- Establishing common data sources.
- Not differing on matters open to more than one interpretation.

The 10 JIC/MOC Cornerstones

JICs/MOCs have well defined and specific parameters established over years of successful operations for different media worldwide. These are described in this document as Ten Cornerstones and include, but are not limited to, those outlined which are considered essential to their successful valid operation.

Overall JICs and MOCs follow similar principles, structures and operations. The differences between JICs and MOCs are driven primarily by funding and underwriting'are differences in the principles and operations between JICs and MOCs driven by funding and underwriting. The term JIC will be used throughout with the MOC exceptions noted and highlighted.

In some countries, notably the UK, “JIC’s” are now referred to as “Joint Industry Currency”.

1. Design, develop and deliver a *single*, owned, copyrighted, credible, objective trading currency for a given medium.

- JICs remove the need for multiple currencies and the resulting chaos that it leads to. The market can be assured that they have the best industry agreed currency available for the medium.
- Establishing copyright regulations for the currency database and subsequent access fees for members and non-members, including Third Party Processors, TPP's, is critical.
- JICs cannot provide the plethora of metrics that all sides of the industry desire on any medium which underlines the importance of potentially designing to each of their trading currencies to dove-tail with other robust databases and especially to other JIC/MOC currencies.
 - The latter currency aspect provides the potential to establish a Super JIC for cross-media measurement and planning or trading metrics. (A long-time aspiration finally being pursued in Holland where all the different media JICs are now located in one building!)
 - Meaningful, harmonized, comparable cross-media measurement provides the basis for estimating reach and estimating frequency across multiple platforms and devices regardless of the content creator, the video length or the display size or quality.
- Generally, JIC's operate as not-for-profit organizations that own the data currency and copyright for a single trading currency along with the independent management operation itself on behalf of its primary members and underwriters (sellers and buyers).
- MOCs are established and primarily funded by various media seller entities who therefore control and own the operation and the resulting currency data. However, MOC's generally embrace full tri-partite involvement.

2. Be Not-for-Profit.

- Designed, developed and executed at cost by the JIC independent management team reporting to the JIC Board as advised by the Technical and Business Committees.
- Pooling all the membership and subscription funds through a not-for-profit JIC significantly reduces the net cost of the trading currency for the medium.
- Should JICs make a profit it is either put into service enhancements/development or reduction of proposed future fees for the underwriters, adjusted accordingly.
- MOC's also are not structured or managed with the goal of generating a profit.

3. Be fully transparent.

- Full transparency is the only means to ensure the investment value/quality relationship regarding the process, cost and results are acceptable to the membership and considered neutral and unbiased.
- Methods, research specification standards and measurement criteria should not discriminate, for or against, any of the media or media vehicles that are reported by the JIC.
- Buyers and sellers must have equitable access to the data outputs. This might be a pedantic clarification of transparency, yet it is important to remember that fair competition relies on fair access to fair data.

4. Have a Tri-partite membership structure.

- The core membership is made up of the media buyers and sellers - Advertisers, agencies, and the media.
 - Often advertisers have minimal if any involvement in JICs.
- Only full subscribing members should have a vote.
- Vendor/Data Contractors/Third Party-Processors, TPPs, are just that and should not be entitled to membership or Associate membership.
 - TPPs and software bureaux should be able to have full and equal licensed access to the data on behalf of their clients who are either members of the JIC or MOC or have purchased data licenses.

5. Have a Tri-partite Board and Technical Committee exclusively from the membership ideally controlled equally by both the Sell-side and the Buy-side.

- The Board and Committee structures are naturally sensitive.
- A JIC and a MOC work best when all media owners participate along with all the major agencies and advertisers.
- The Board, Technical and Business/Marketing Committees should be entirely member based ideally with the “buyers” in the majority as well as having the key Committee Chair positions to remove any potential biases or inappropriate skews driven by sellers. Regrettably, this is generally not the case for JICs and is **not** the case for MOC’s where the sellers would have overall control of all decisions via the Board and various committees.
- The Technical Committee ideally should also reflect a majority of members from the buy side (advertisers and media agencies) which ensures that potential seller side biases or inappropriate techniques lacking required quality are eliminated. However, this is also not generally the case as the sell-side tends to dominate Technical Committees.
 - Start-up JICs should consider having a disproportionate buy-side influence.
 - Research contractors/vendors to the JIC should participate (without a vote) in all relevant Technical Committee meetings.
- Some JICs allow the major industry Associations to have membership or associate membership and their consequent involvement may be extensive. This potentially assists any industry group in obtaining an ultimate consensus on any issues based on a pre-determined unified position on various issues by any key buyer/seller groups for recommendations and presentation to the JIC.
- The JIC/MOC difference is reflected by the funding and whether the buy side is involved directly and an active stakeholder (JIC) or indirectly as in a (MOC). (See Cornerstone #9)

- The Australian model of the MOC is a slightly different variant. The major commercial media owners provide the majority of the funding, and each commercial media owner earns equal voting on the Board. The Board then appoints the Business Management who appoint their technical staff. The Technical Committee then consists of each Board member's technical appointments, the Business Management's technical staff, plus the addition of the technical appointments from the other broadcasters (ABC, SBS, Foxtel), the media agencies (Media Federation of Australia – MFA), and the advertisers (Australian Association of National Advertisers – AANA) who advise the Business Management and the Board. The additional broadcasters, the MFA and the AANA have an observer seat in the Board Meetings, but the voting is left to the Commercial Media Owners.
- In the UK, the IPA represents the buy side at BARB Audiences and are underwriters with a Board position along with five major broadcasters – BBC; Channel 4; Channel 5; SKY; and ITV. ISBA, Incorporated Society of British Advertisers, UK is a Board member, but ISBA is not currently a BARB Audiences underwriter. They are not precluded from doing so.

6. Be managed by a highly expert, strictly independent management and staff as a not-for-profit entity.

- The overall staff management function is to inform and manage the Board and Technical Committee meetings, and crucially be the conduit to the subscribers and to the market.
- The Board sets the fiscal structure and pricing model for each sector of the industry which should be transparent and equitable.
- The management team sells and supports the data to members/subscribers (e.g., media, agencies, advertisers, third party-processors, TPP's, other data entities) for incorporation of the single agreed media trading currency into their operations.
- Currency trading data access is based on a JIC license with strict requirements for use albeit with due flexibility.
- Staff ensures the JIC retains and protects its copyrighted data.
 - In an era of increasing demand for cross-media modelling, this is critical to ensure that the medium's single currency ratings (including reach and frequency estimates) are preserved in any use by any entity, ancillary services or in any media/ad models.
- Typically, the management team manages the multiple vendor contracts involved along with the development and research (internally or externally via vendors) required to generate the media currency. Some JICs/MOCs are mandated to build a specialized full time internal technical group to develop and execute the agreed research methodology to the Technical Committee's evolving specifications.
 - A unique example of a MOC that operates and executes all the dimensions of the research and systems needed to provide a single trading currency to the industry, is Numeris in Canada, formerly The Bureau of Broadcast Measurement, BBM.
- The various vendor/contractor or contractors, if ultimately retained, execute the research to RFP specifications established by the Technical Committee and approved by the Board and overseen by the JIC management team.

- The key research areas would generally come under the following headings:
 - Survey design, methodology & panel health audit.
 - Panel management and data delivery.
 - Establishment survey & panel recruitment.
 - Census-data collection for broadcaster VOD viewing.
 - Integration and harmonization of panel, device and census data, e.g., projects like Dovetail Fusion in the UK.
 - Content ID harmonization system.
 - Auditing census data.
 - On-going independent verification of all key elements.

7. Establish and continually monitor “agreed” highly detailed and complex specifications as well as future developments and needs as they arise.

- This ensures full data coverage for a comprehensive, high-quality database & currency across the media vehicles “agreed” to be measured within the medium based on the content and coverage criteria established.
- The complexities of identifying and integrating all the research elements required, executed and measured to generate an explicitly defined and agreed on-going trading currency are well known. These extraordinary complexities are not the purview of this White Paper.
- Standards and more typically Guidelines covering the significant complexities and intricate details for media research measurement, medium by medium, have been developed by independent industry authorities around the world over the years. They continue to serve as insightful road maps to JIC staff and their Technical Committees in executing and delivering their trading currency.
 - The Media Rating Council, MRC, in the US has produced an extensive library of minimum Standards [*sic*] and Guidelines on media, marketing and advertising outcomes measurement that continue to be expanded and updated. The MRC, which comes under the auspices of the US Department of Justice, is a tripartite, not-for-profit industry organization. It also “Accredits” research vendors based on its Guidelines (Standards) for those research companies wishing to submit to its extensive and rigorous process.
 - For linear Television, GGTAM, General Guidelines on Television Measurement, developed in the late 1990’s by an international group of media research experts including the authors of this Paper, addressed many of the measurement complexities faced by TV JICs at the time.

JICs, Joint Industry Committees & MOCs, Media Owner Committees – Ten Cornerstones

- ESOMAR published the “Global Guidelines on Out-of-Home Audience Measurement” 2009 which underpinned the launch of many OOH JICs worldwide. The Guidelines were enhanced and updated by the World Out-of-Home Organization, WOO, 2022 – “Global OOH Audience Measurement Guidelines”.
- Most TV/Video trading currencies produced by JICs are externally audited/overseen by a local oversight organization like the Media Rating Council, MRC, in the US, CESP in France, AIMC in Spain or by international outside auditing companies like PWC, or specialists like 3m3A.
 - However, those audits may be sporadic, addressing the foundations of the required specifications rather than ongoing independent monitoring and verification of data quality and releases.
 - Of note: Barb Audiences, UK, argue that they do not need to be periodically audited by an independent entity as RSMB UK monitors its data quality on an on-going basis.

8. Ensure a stringent RFP (Request-for-Proposal) process.

- The Technical Committee acts as the “engine room” on the specifications regarding the research methodology, any data integrations, calibrations or projection and final trading currency and consequently the RFP process.
- All the research and database elements developed and provided by the rigorously selected research contractors/vendors (sometimes merged into a consortium) are via a stringent fully non-partisan process under the auspices of the Technical Committee who advise the Board.
- This approach maintains on-going competition and leading-edge deliverables based on continual “listening to the market”.
- While research contractors/vendors or industry suppliers are not entitled to JIC membership, its rights or its privileges and specifically not involved in JIC management, they should fully participate (non-voting) with the Technical Committee when appropriate. (See Cornerstone#10)
- While under regular review via an RFP process every 3-5 years, usually after an initial 5-year term, vendors do not typically change significantly albeit the currency will evolve.
 - Consequently, there is ongoing relative consistency to the trading currency, but it is always subject to on-going measurement and metrics quality improvements to meet industry needs.
 - For the non-selected media measurement research companies, developing enhancements to the basic JIC trading currency offers unique opportunities to play a significant role in the media metrics arena. “The toppings on the pizza.” (This contrasts with offering an alternate currency to the JIC for the few media content delivery providers or media agencies that see a special advantage based on their preferred and “different” measurement approaches and/or defined audience base.)

9. Establish funding and set the access prices to the currency data for JIC/MOC members, Associate members, Third-Party Providers and industry users.

- The JIC/MOC difference is really reflected by the funding and whether the buy side is involved directly and active stakeholders (JIC) or relatively indirectly (MOC). (See Cornerstone #5)
- In JICs the sellers typically provide the majority of the funding while the buyers are minority underwriters but are fully represented on The Board of Directors and Technical Committee to ensure “no fox” in the methodological/technical or business or pricing “hen house”.
- Funding mechanisms and data access pricing vary widely by JIC/MOC. MOC’s are funded primarily by the media sellers who own and control the rights, the approach, the operation and the data unlike JICs.
 - Buyers usually participate extensively in a MOC but without control.
- Fundamental to JICs successful business operation is that the database and metrics are owned and developed by the JIC “on behalf of” the communications industry. Advertisers, agencies, and media owners work in concert to deliver one single credible and objective trading currency across all vehicles within the medium.
- The JIC establishes the pricing & contracts for access to the metrics.
 - Again, pricing is underpinned by the principle that buyers and sellers have equitable access to the data outputs.
- JIC/MOC funding is typically augmented via data license fees including strict usage requirements for members, associate members and for vendors to the industry, e.g., Third Party-Processors.
 - JICs generally have a Data-Distribution Working Group where it consults with third-party analytics providers on the practicalities of introducing changes regarding how the trading currency is delivered to the market.

10. Ensure research contractors/vendors/suppliers to the research/data industry are not eligible for JIC/MOC membership nor have any JIC management involvement.

- Whether involved in the intricate development of the JIC media currency or not, research contractors/vendors or industry suppliers are not entitled to JIC membership, its rights or its privileges.
- Research contractors/vendors or industry suppliers should not be involved with the day-to-day management or oversight of the JIC/MOC.
 - They are contractors/vendors with potential conflicts of interest or vested interests with their client users of the trading currency that also have vested interests!
 - However, advice and recommendations from research contractors/vendors to the Technical Committee and/or JIC staff on technical/research/methodological should always be sought on critical issues. This ensures that constant innovations are assessed and potentially embraced.

Benefits of JICs

Does it really matter how we label the organisation? Yes!!

A true JIC/MOC:

- Removes the mayhem of multiple currencies and the resulting chaos that they lead to. The market can be assured that they have the most meaningful trading currency available.
- Provides an agreed baseline trading currency for any major media.
- Ensures industry consensus and ownership of a single credible, objective trading currency.
- Provides confidence for the advertiser that their ad-spend is based on an independent audited methodology that is accepted by the sellers and buyers and which consequently provides optimal advertising relevance and value.
- Ensures significant cost savings that could be reinvested in a (single) service rather than having the market spread its money across multiple (competing) services along with the associated “tyranny of chaos.”
- Produces unrivalled value for money whether for a trading currency or a planning basis.
- Delivers transparency, accountability, and stability to any measured medium.
- Embraces on-going independent monitoring & auditing to ensure specifications and quality goals are continuously maintained as well as across all future developments as they arise.
- Avoids the inefficiency and ineffectiveness of running multiple currencies via different suppliers for the same medium.

The bottom line is that true JICs/MOCs save their local industries millions, year after year, after year and bring trust, stability, and cost effectiveness to the buy/sell process. They are a great deal of work and certainly full of complexities and frustrations.

The Long-Term Future of Media Currencies & evolution of JICs/MOCs

As referenced by Richard Marks, ‘Research The Media’, in an article in UKOM News & Views, 2018, GfK considered that there were three long-term scenarios for media currencies and consequently JICs/MOCs, but they did not indicate which is the most likely.

- The currencies become ‘Super JICs’, gathering and endorsing various external data sets alongside their own research.
- The currencies become decentralised, using technology like blockchain to bypass traditional research panels and connect users directly with consumer data.
- Anarchy: media platforms trade directly with their own walled garden data which is not pooled or shared.

After 5 years it appears that all three scenarios are operative in various forms and in various parts of the world.

- ISBA, the UK Association of Online Publishers (AOP) and IAB are members of UKOM, UK Online Measurement. However, in the opinion of the authors, it probably should not be considered a JIC or a MOC as it endorses and oversees a single on-line measurement service. In parallel with 2023 US TV/Video Multi-Currency Certification Committee, M-CCC, UKOM could be considered an S-CCC, Single-Currency Certification Committee.

<https://ukom.uk.net/newsandviews/91-piecing-measurement-together-how-does-ukom-fit-into-the-currency-jicsaw.php>

Conclusions

In reviewing the key values, principles, and requirements of various JICs & MOCs worldwide, it became clear that there was no definitive document that provided the currently established core principles and parameters.

It is genuinely hoped that this White Paper brings a comprehensive understanding of the operational parameters, role, principles, and values of JICs & MOCs in media currency research worldwide. Consequently, we hope this White Paper will correct the misinformation around this unique industry collaborative service. JICs represent standards for consensus-based business structure and process that establish a single media trading currency for each medium.

The authors intend this Paper to be a living document that will continuously be polished and enhanced based on best practices and further expert input.

JICs and MOCs need to continue their development, evolution, and adherence to their mission in providing a single media trading currency, medium by medium. These unique organizations have consistently provided the most relevant, meaningful, highest quality, cost effective data possible that underpins the management, execution and development of both media content and brand advertising for the consumer.

The authors believe that only by following the principles, procedures, and practices of JICs or MOCs can the media and ad industry in any country ultimately agree on the single trading currency that is affordable and meaningful medium by medium and thereby avoid the chaos of choice produced by having alt-currencies for any medium.

The authors trust that this White Paper will be accepted as a Global industry reference regarding JIC's/MOCs. and ***most importantly by the advertisers who provide the funds in the first place.***

We look forward to receiving on-going insights and POVs from our international colleagues. Our full contact details are at the end of this document.

The Authors – Contact Details

Tony Jarvis OLY

Research Architect
Olympic Media Consultancy
North Venice
Florida
USA

tony@olympicmediaconsultancy.com

(m) +1 203 451 3111

John Grono

CEO
GAP Research
Bundanoon
NSW
Australia

jgrono@bigpond.net.au

(m) +61 0405 538421