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 **Summary of 2.6.20 CIMM**

**Cross-Platform Media Measurement & Data Summit**

 **February 2020**

***WELCOME: Redefining Objectives and Progress***

Jane Clarke, CEO & Managing Director of CIMM, welcomed attendees to the 9th Annual Cross-Platform Media Measurement & Data Summit, highlighting progress made throughout the industry on solutions for cross-media measurement and in bringing more granular measurement to TV – twin interrelated objectives for CIMM. Jane announced that CIMM’s membership doubled in 2019 from 20 to 40 companies in the time that the organization became a subsidiary of the non-profit Advertising Research Foundation. The growth has come from companies in the granular “TV Data” ecosystem who are seeking to bring transparency and best practices to new forms of TV measurment. Jane also recognized members of CIMM’s Brand Marketer Advisory Council: American Express, Bank of America, L’Oreal, Nestle-Purina and Pepsico.

Attendees were provided with a review of CIMM’s mission and roadmap, which has evolved to include support for measurement of emerging TV video “platforms” that seek to standardize reporting of impressions across all forms of linear and data-driven TV, VOD, OTT, Addressable TV and digital video. Jane pointed out how the goalposts for complete cross-media measurement are constantly changing, primarily due to shifts in consumer behavior in response to new technology. The latest distruption will come from the growth of national addressable TV via MVPDs and through DAI into Smart TVs.

Jane emphasized continued advances in the availability and use of TV data, especially for attribution. She announced the launch of a CIMM study with Sequent Partners and Janus Strategy and Insights to study the data inputs into TV Attribution across 10 providers. Additionally, she pointed out that 2019 saw marketers get involved in creating guidelines for cross-media measurement through an initiative with the WFA’s Media Committee. They will publish a Measurement Manifesto soon, which is similar to the one CIMM created five years ago, but that emphasizes inclusion of ad impressions from Google and Facebook.

Jane commended the MRC on completing their cross-media measurement standard, even though, as she identified, more work is needed on duration measurement. Additionally, the IAB Tech Lab has launched a Data Label to bring more transparency to the descriptions of third-party data. Finally, Jane introduced a new industry initiative, the Advertising Metadata Standardization Initiative (AMSI), which looks to align the industry around the use of Ad-ID to identify ads accurately and also standardize the ad formats and associated metadata to improve accuracy and speed in analyzing cross-media campaigns. Participants include IRI, Kantar, Ad-ID, 4A’s, ANA, ARF and CIMM to date, and more are joining prior to the March kickoff meeting. Jane’s presentation is posted to [www.cimm-us.org](http://www.cimm-us.org)

***MEASURING OUTCOMES: Buyers & sellers on the changing goal of cross-platform video measurement***

Howard Shimmel, President of Janus Strategy and Insights, moderated a panel with Jenny Gardner, Senior Director, Media, North America, Unilever; Tim Spengler, President, M1, Dentsu Aegis Network Americas; and Lisa Valentino, EVP, Client and Brand Solutions, Disney Advertising Sales. Panelists began by discussing how the consumer experience of advertising needs to be improved and how the industry needs to solve the basic challenge of consistent and comparable counting of impressions across all media prior to enabling accurate measurement of outcomes.

Jenny emphasized Unilever’s role in establishing the WFA’s cross-media measurement initiative, pointing out that Unilever can’t grow its business without knowing where its ads run and having better measurement of unduplicated reach across all media, particularly TV and digital. She spoke of Unilever’s framework of “Now, Near and Next” to allocate time and money across existing and new media. Jenny also pointed out the paradox of never having seen a “bad” brand lift study, despite her brands not growing. Lisa spoke about the challenge of consolidating all the Disney brands under one technology platform to enable better use of data and gaining the ability to deduplicate reach at least across Disney brands. Tim spoke about how DTC brands are pushing better measurement of outcomes and how the creation of Dentsu’s M1 Data Platform is improving their cross-media planning.

***KEYNOTE: Global Principles for Cross-Media Measurement***

Belinda Smith, Head of Global Marketing Intelligence for Electronic Arts, gave a presentation about the WFA cross-media measurement initiative. She emphasized that it’s important for this intiative to be lead by marketers, but that they are working with a variety of partners in the design of new systems. She reviewed the “listening tour” that marketers have taken over the past year to hear about cross-media solutions from different countries and research vendors and outlined the goals of achieving comparable measurement of unduplicated cross-media reach and frequency for both planning and campaign evaluation. Finally, she highlighted the four principles that will be addressed in each country implementing a Pilot Test: governance, metrics & data, privacy and pipework. Belinda ended by clarifying that the global principles will guide market-specific initiatives, which will be overseen in the U.S. by the ANA.

***PRIVACY AND PLUMBING: Designing privacy-compliant solutions to deduplicate reach across media***

Scott McDonald, CEO and President of the Advertising Research Foundation, moderated a panel to probe more deeply into creation of an infrastructure (“the plumbing”) for cross-media measurement in a privacy-compliant way. Elissa Lee, Director, Research, Advanced Measurement Technologies, Google, shared that there are new methods emerging to link IDs from different platforms in “safe rooms” using encryption and other new technologies. Brad Smallwood, VP, Marketing Science, Facebook, concurred that designing a system is a complex engineering challenge and also emphasized that it’s important to include display ads, alongside video. Claudio Marcus, VP, Strategy, Comcast Advertising, highlighted the need for trust and transparency from all partners and pointed out that pay TV operators have strict privacy guidelines and typically only release data at a cohort/segment level. Kanishka Das (“KD”), Global eBusiness Analytics and Insights Leader at P&G, said that marketers just want to get the data flowing, so that they can improve the consumer experience of advertising and conduct their own analyses to grow their businesses.

 ***UPDATE ON CIMM TV ATTRIBUTION STUDY: Unpacking Data Inputs***

Alice Sylvester, Partner at Sequent Partners, opened with a presentation (posted to [www.cimm-us.org](http://www.cimm-us.org)) to introduce a new study CIMM has launched with Sequent Partners and Janus Strategy and Insights. The study will unpack two kinds of data inputs into TV Attribution: Ad Occurrence data from Hive, iSpot, Kantar and Nielsen; and Ad Exposure data from 605, Ampersand, Alphonso, Comscore, iSpot, Nielsen (NCS), Samba, TV AdSync, TV Squared and VideoAmp. The study will do this by examining six national network TV tune-in campaigns and one brand campaign. Following Alice’s presentation, she moderated a panel discussing the challenges and opportunities in TV Attribution with her partner, Jim Spaeth and their collaborator, Howard Shimmel of Janus Strategy and Insights.

***FRONTLINE AT THE STREAMING WARS: How are consumers navigating and enjoying content options?***

Lisa Heimann, EVP, Corporate Research and Strategy at NBCUniversal Media, moderated CIMM’s first-ever all-female panel on consumer use and industry measurement of new streaming apps. Nathalie Bordes, SVP, Data and Insights at CBS Interactive, spoke about how the goal of SVOD apps is to bring in subscribers through content and free-trial offers, but then retain them with a good consumer experience. Colleen Fahey-Rush, EVP and Chief Research Officer, ViacomCBS, spoke about how Pluto is more like the pay TV ad model, in which you acquire people and provide them with a massive depth of content that is ad supported.

Julie DeTraglia, VP and Head of Research and Insights at Hulu, pointed out that exclusive content drives the initial subscription, but that subscribers are retained with a breadth of content. Hulu also segments their subscribers by content genre to make sure they satisfy different segments. Natasha Hritzuk, VP, Consumer Insights at WarnerMedia Entertainment, spoke about the kind of “consumer experience” research being done to plan the launch of HBOMax. All panelists discussed the role of their own proprietary first party data in understanding consumer experience and providing ad impression data, as well as the issues with third party measurement when content providers are competing for content but need planning tools for advertisers. An additional challenge is understanding who is in front of the TV, since first party data is at the device level and panels are too small to capture the full range of fragmented content viewing on apps.

***ADDRESSABILITY BREAKS NATIONAL TV MEASUREMENT: The future of TV measurement***

Helen Katz, SVP, Global Director, Insights and Analytics at Publicis Media, opened the panel by sharing two slides that described Project O.A.R. (Open Addressable Ready) and the measurement spec that has just been released (slides posted to [www.cimm-us.org](http://www.cimm-us.org) ). Project O.A.R. is a consortium of companies working with Vizio/Inscape to create an open standard to dynamically insert ads into Smart TVs. The measurement spec includes the following principles: open and non-proprietary, impression-level granularity, separation of ads from content/context, privacy compliant, and with the ability to link to other datasets via safe ID-graphs to deduplicate reach. Panelists included Brian Hughes, EVP, Managing Director, Audience Intelligence and Strategy, Magna Global; Radha Subramanyam, Chief Research and Analytics Officer, CBS and President CBS-Vision; and Tom Ziangas, SVP, Research and Insights, AMC Networks.

Panelists also discussed Nielsen’s DAI initiative and general principles around the measurement of national addressable TV, since the challenge with panel-based measurement is that it can’t separate addressable from non-addressable impressions. As such, this discussion touched on the larger issue about moving TV currency to impressions-based measurement across all TV/video platforms. Nielsen is working with their Senior Research Council to decide between several methods to do the separation of addressable from non-addressable impressions, but no decisions have yet been made. It will most likely include some combination of receiving impressions data from those delivering the addressable ads to also measuring at a less granular level than the current C3 rating, which averages all the minutes with any commercials for an entire show.

***ONE TV PLATFORM TO RULE THEM ALL: How many platforms can marketers manage?***

Jamie Power, COO, Addressable and Head of Analytics at Cadent, moderated this panel which included MVPD data platforms (Dan Rosenfeld, SVP, Analytics and Insights, Xandr and Bob Ivins, Chief Data Officer, Ampersand), as well as Dave Antonelli, Director, Sling TV Ad Stragegy and Revenue at DISH Media. Additionally, Mike Dean, SVP, Advanced Advertising and Automation at ViacomCBS, represented the national network sellers, and Matt Sweeney, Chief Investment Officer, GroupM U.S., represented the buyers. The panelists discussed ways that platforms can at least collaborate on standards and interoperability, even if they may not fully combine into one TV/video trading platform. They agreed that it’s complex today for a marketer to buy TV across its many formats from linear to data-driven linear to addressable VOD, DAI and digital video. Different platforms represent different inventory, and it’s a challenge for buyers to deduplicate across them. The main takeaway is that everyone in the TV ecosystem is talking to each other and is potentially open to finding better ways to collaborate to improve the experience for buyers and to continue to grow the TV advertising market.

***CLOSING FIRESIDE CHAT: Next steps to meet marketers’ demands for cross-media measurement***

Bill Tucker, Group EVP at the ANA interviewed Ben Jankowski, SVP, Global Media, Mastercard, and chair of the World Federation of Advertisers’ Media Committee which launched the recent cross-media measurement initiative. Ben reiterated some of the same points that had been made on earlier panels about the goals marketers want from cross-media measurement, which is to deduplicate reach of their ad campaigns across TV and all digital platforms, as well as manage frequency. Bill Tucker spoke about hiring Artie Bulgrin as the Project Manager for the ANA’s Pilot Test of cross-media measurement. Ben also emphasized that big global marketers would like some global measurement consistency from Azerbaijan to Zaire (A to Z). They covered the four areas of the WFA’s Measurement Manifesto, which are: standards and metrics, privacy, pipeline and governance. He said that advertisers already feel as if they support the entire advertising ecosystem, but that he’s confident the industry can find new ways to fund the new measurement system that is needed.