



Summary of 2.7.19 CIMM Cross-Platform Video Measurement & Data Summit

February 2019

Opening Remarks

Jane Clarke, CEO & Managing Director of CIMM, welcomed attendees and highlighted that progress is being made in providing solutions for cross-media measurement, but there are still gaps and blind spots. Jane's remarks underlined the challenge to change existing TV measurement while transitioning to digital measurement for all video at the same time. Jane summarized that Nielsen and comscore both made improvements in 2018 in content measurement and in deduplicating ad campaign measurement, but most networks have still created their own tools for counting cross-platform video ad impressions that are being used in the market. The biggest change in the last year has been the growth of TV Attribution measurement, made possible by the growing availability of ad exposure data from Smart TVs and set-top boxes, with Comcast in particular now making data available. Jane addressed CIMM's Measurement Manifesto, but pointed out that the goalposts for success are constantly moving, and marketers need to make their voices heard in 2019 if they want to have their needs included in the industry requirements. The presentation slides can be found at cimm-us.org.

Jane also highlighted two new tools for the industry: 1) TAXI Complete, in which standardized names/metadata for both ads (using Ad-ID) and content (using EIDR), can now be carried in cross-platform video via a SMPTE standardized watermark from Kantar Media; and 2) Data Label, which provides a standardized way for data providers to transparently describe the composition and provenance of data used to create audience segments used in media targeting. Both TAXI Complete and the Data Label were discussed in separate sessions during the Summit.

Fireside Chat: Future of TV Measurement, Advanced Advertising & TV Platforms

Krishan Bhatia, EVP, Business Operations & Strategy, NBCUniversal was interviewed by Lucia Moses, Deputy Editor, Media, Advertising & Telecom at Business Insider. During the fireside chat, Krishan confirmed that the cross-platform premium video ecosystem is in the midst of tremendous change and increased complexity, and that NBCU is taking a leadership position. Krishan said NBCU is not opposed to industry-wide initiatives, but they want to take the lead in what is best for their business. He pointed out that in the future we might not need a single currency for trading cross-platform video, but that individual media companies may rely on their own metrics. This can include counting campaign impressions such as CFlight, along with customized measurement of impact. His feeling is that agencies and marketers are growing more comfortable using proprietary metrics from different TV networks, along with entire marketing solutions that are more tailored to the needs of a marketer and may include customized content integration as well as customized measurement. He also indicated that as TV becomes more like digital media (with 5G and IP delivery, and a focus on audience targeting and measurement for individual ads), all measurement will become like today's digital and OTT video measurement.

Business Leaders Speak Out:

Janet Balis, Global Advisory Leader, Media & Entertainment at EY moderated a panel with Rob Master, VP, Media and Public Relations, The Americas, Unilever; David Cohen, President, North America, MAGNA Global; and Laura Nathanson, EVP, Revenue & Operations, Disney Advertising Sales. Rob pointed out that Unilever is creating their own customized solutions for cross-media measurement, even if they're not perfect yet. He acknowledged that we need more transparency in the industry, along with a common language and method for counting impressions. David spoke about the article he had published that morning in Ad Age about his desire for the TV industry to move to commercial minute ratings as a parallel currency to C3 ratings in the 2019 Upfront. He also mentioned that MAGNA Global is a supporter of TAXI, for the purpose of standardizing and speeding up video asset identification. Laura shared news that Disney has

created one sales organization for cross-platform video across all Disney brands. She pointed out the challenges of working in a unified way, but said it is necessary now.

The panelists discussed the challenges of targeting and addressability vs. reaching broad targets with mass products, and indicated that we need to resolve issues with comparability of metrics for counting impressions while moving ahead with attribution solutions. Additionally, they discussed some of the data privacy issues surrounding the ability of marketers to measure deduplicated reach across all marketing channels.

CIMM Study Release: TV Attribution Whitepaper/Provider Guide & Discussion Panel

Alice Sylvester, Partner at Sequent Partners, gave an opening presentation (posted to cimm-us.org) introducing the new TV Attribution Provider Guide and covering key issues in the new area of TV Attribution. She reviewed challenges of TV Attribution, including how to measure all kinds of TV (linear, time-shifted, on-demand, addressable and both short and long form); handling short-term vs. longer term impact of TV, along with upper and lower funnel impacts; disentangling issues with data quality of both viewing and impact data, and the use of control groups to capture incremental sales; bridging the knowledge gap among vendors and clients; implementing the right solution to match the right challenge; and how to validate and apply results. She also noted the importance of not forgetting the impact of ad creative.

Furthering the TV Attribution discussion, Jim Spaeth, Partner at Sequent Partners, moderated a panel with Alice and Claudio Marcus, GM, Data Platform, FreeWheel and Lisa Giacosa, EVP, Global Managing Director Data, Technology, Analytics & Insights, Spark Foundry. The panelists displayed their excitement about the new granular TV data that is enabling TV Attribution, but also warned that sellers need to be transparent about their offerings and buyers need to be smart about asking all the hard questions. Claudio told a story about how Comcast decided to release their ad exposure data when they realized it helps sellers show the value of TV. Lisa informed the audience that marketers need to understand the impact of TV as part of a holistic attribution solution that includes all the other marketing channels and tactics, such as FSIs, pricing, search, social, print and customer experience, which are all needed to understand impact and assign attribution to each channel. The presentation slides can be found at cimm-us.org.

TAXI COMPLETE: Multiple use cases for a new industry “UPC Code”

Harold Geller, Executive Director, Ad-ID; Will Kreth, Executive Director, Entertainment Identifier Registry; and Steve Davis, Global Product Director, Kantar Media shared progress on achieving TAXI (Trackable Asset Cross-Platform Identification) Complete. They explained the initiative to embed standardized identifiers (Ad-ID for ads and EIDR for content) into an audio watermark from Kantar Media which has been standardized by the Society of Motion Picture & Television Engineers (SMPTE), along with a second watermark to identify distributors/networks. They showed a video to demonstrate the new standard, and clarified how to register assets, embed the watermarks and gave examples of innovative new uses for this exciting technology, from tracking and measurement to Dynamic Ad Insertion (DAI) and second screen synching. The presentation slides can be found at cimm-us.org.

DATA LABEL INITIATIVE UPDATE: Data Providers and DSPs have a new tool for transparency

David Kohl, President & CEO, TrustX gave an update on the collaborative effort between the ANA/DMA, IAB Tech Lab, CIMM and the ARF to create a Data Label which is a standardized way for data providers to transparently describe the composition and provenance of data used to create audience segments used in media targeting. There is a beta test online, which has over 100 participants providing feedback, prior to industry rollout. The presentation slides can be found at cimm-us.org.

DEDUPLICATING REACH FOR CONTENT & ADS: End users discuss solutions from comscore and Nielsen

Scott McDonald, CEO & President, Advertising Research Foundation moderated a panel that included Radha Subramanyam, Chief Research & Analytics Officer, CBS Television Network; Eric Cavanaugh, SVP, Global Digital Marketplace Intelligence, Publicis Media; Beth Rockwood, SVP, Ad Sales Portfolio Research, Turner; and Ed Gaffney, Director of Implementation Research, GroupM. During the session, the panelists discussed the need to deduplicate reach in measurement of both content and ads, since content measurement is required not only by media companies but for ad buyers to do media planning. They pointed out that an objective third party measurement is needed, rather than all media companies “grading their own homework,” but that vendors need to stay close to their customers as requirements shift constantly. This siloed approach won’t allow for identity to be deduplicated across publishers and

channels. The panelists also discussed how the privacy challenges are becoming harder with new privacy regulation, since it gives publishers an excuse not to share data. Additionally they discussed how marketers should focus more on broad marketing to segments of customers, rather than marketing individuals. While 1:1 marketing may become technically feasible, it's too expensive to create personalized messages and the "creepiness" factor will turn off consumers. Finally, the panelists spoke about whether it's worthwhile to create new TV currencies now when the near term introduction of 5G and IP distribution will make all TV measurement more like digital measurement anyway. However, that timeframe is uncertain.

ONE METRIC TO RULE THEM ALL? Or different metrics for different uses?

Terry Cohen, SVP, Media & Data, 4A's moderated a panel which included Kavita Vazirani, EVP, Insights & Measurement, NBCUniversal; Brian Hughes, EVP, Audience Intelligence & Strategy, MAGNA; George Ivie, Executive Director & CEO, Media Rating Council; and Sheryl Feldinger, Research Scientist at Google. Brian Hughes reiterated the call earlier in the program from David Cohen of MAGNA that the TV industry needs to measure commercial minute ratings alongside C3/C7 for the next TV Upfront. George Ivie announced that the MRC will soon be releasing for public comment their cross-media comparable video metrics standard which recommends measuring duration, and may go as far as calling for duration-weighting, along with counting only viewable impressions with presence of audio noted. Sheryl pointed out that Google has studied the issue of duration weighting extensively, and found that the amount of time spent by consumers has a linear relationship with brand favorability metrics (i.e., the longer you view an ad, regardless of its length, has a positive impact). Kavita stated that counting impressions doesn't equate to value for a marketer, and that it's important to remember the goal of advertising for the marketer, which is to drive brand growth.

AUDIENCE-BASED BUYING PLATFORMS FOR TV/VIDEO: Where are we now & where are we going?

Jeanine Poggi, Senior Editor, Media & Technology, Ad Age moderated a panel about a range of Advanced TV topics, which included Bryson Gordon, EVP, Advanced Advertising, Viacom; Mike Law, EVP, Managing Director, US Media Investment, Dentsu Aegis Network; Bob Ivins, Chief Data Officer, NCC Media; and Mike Welch, SVP, Corporate Strategy & Business Development, Xandr. Jeanine inquired the panelists on the success of data-driven linear audience-based buying, as well as the forecast for delivering nationally-addressable ads. Overall, the panelists were positive about client uptake, but acknowledged that there are still industry challenges, with the main one being a consolidated selling platform for TV across all pay TV distributors and OTT platforms. It's still harder to buy TV than to one-stop shop at Google or Facebook. Additionally, they reiterated that it's challenging to produce personalized ads for addressable TV, when the realistic approach is to have a few creative options to address sizeable segments.

CLOSING FIRESIDE CHAT: CES TOUR HIGHLIGHTS: A Glimpse into the Future of Advertising & Media

Jack Smith, Chief Product Officer, Global Investment, GroupM closed out the Summit in an interview with Allison Schiff, Senior Editor, AdExchanger. Jack provided highlights from his tours for GroupM clients at CES, as well as other forecasts for the future. Among other innovations coming soon, such as 5G, he pointed out that voice assistants are having a major impact on purchase behavior, though making measurement more difficult. He also illuminated the opportunity autonomous cars offers the industry, given that riders will be a captive audience for video, advertising and e-commerce. He also addressed privacy challenges, noting that they are now becoming a high priority to resolve. Jack emphasized that the industry needs to build all new measurement solutions to be privacy-compliant. Finally, Jack highlighted industry challenges with fake news and fraud, and predicted that new technology will constantly bring management, legal and measurement challenges.