



10th Annual Cross-Platform Video Measurement & Data Summit

February 3 12:00 – 2:00 PM EST | February 4 12:00 – 2:30 PM EST

SUMMARY

DAY 1: Wednesday, February 3: 12-2:00pm

WELCOME: Industry Progress Report

Jane Clarke, CEO & Managing Director of CIMM (subsidiary of the ARF) welcomed attendees to the first virtual and 10th Annual Cross-Platform Video Measurement & Data Summit. She summarized that from CIMM's work, and that of others in the industry, there are four main building blocks to cross-platform video measurement:

- 1) Standardized second-by-second "census-like" data from Smart TVs and Set-Top Boxes that have been combined to create TV content and ad tuning datasets that are as nationally representative as possible;
- 2) Standardized second-by-second digital census data from sites and apps for content and ads that were delivered and viewable;
- 3) A single-source cross-media panel, or separate linked TV and digital panels, to calibrate skews or estimate data missing from large datasets; and
- 4) ID resolution to deduplicate reach across all touchpoints and also to create audience segments, manage ad frequency and conduct attribution.

Jane summarized industry progress in creating these building blocks, but also identified that much work is still needed, as both technical and business challenges remain. Progress in 2020 included the MRC Standard on Cross-Media Measurement; the launch of NielsenOne – in spite of a launch date of 2024; the involvement of marketers in the WFA/ANA's Global Framework and Technical Blueprint for Cross-Media Measurement; the IAB Tech Lab's launch of Project Rearc to find new solutions for ID resolution; and a lot of proprietary measurement initiatives from vendors, media companies, MVPDs and various consortia which are advancing the ability to trade on cross-platform video, but still don't offer buyers a unified and deduplicated measurement of all available inventory.

She summarized CIMM's 2020 initiatives through four Committees:

- 1) ***Attribution & ROI***: Completed Study on ***Data Inputs into TV Attribution*** which concluded that standardized and audited spot-level measurement is needed for TV, and also that Smart TV and STB data increase the accuracy of ROI analyses;
- 2) ***Advanced TV & Data***: Published report on ***Best Practices in Combining Smart TV (ACR) and Set-Top Box Data***.
- 3) ***Advertising Metadata Standardization Initiative***: Collaborated with 11 analytic vendors and industry associations to recommend standards for ad identification (Ad-ID) and standardized file formats;

- 4) ***Cross-Media Measurement***: Hired EY to complete confidential interviews and run a workshop among buyers, sellers, MVPDs and technology vendors to design a decentralized platform for ***TV Data Interoperability and ID Resolution*** to be used for planning, optimizing activation, measurement of deduplicated reach and attribution.

BUYER & SELLER UPDATE: Collaborating to Design Cross-Platform TV/Premium Video Measurement

Janet Balis, EY's America's Customer and Growth Market Leader and CMO Practice Leader, moderated a panel with some participants from both EY's Future of TV consortium and the CIMM Project on ***TV Data Interoperability & ID Resolution***: Grace Dolan, VP, Integrated Marketing, Home Entertainment, Samsung Electronics America; Denise Colella, SVP, Advanced Advertising Products & Strategy, NBCU; and Adam Gerber, Global Chief Media Officer, Essence. Panelists opened the session by discussing "Adam's Wheel," which is a chart created by EY's FOT Workshops showing the 20+ different platforms with TV/premium video inventory and how they're all measured differently. Panelists verified that the industry needs solutions to deduplicate reach at least across all forms of TV/premium video inventory, if not also including other digital platforms and the walled gardens.

All the panelists agreed that while individual media companies are making progress (such as NBCU's OnePlatform), greater collaboration is needed to offer a unified decentralized solution, with the requirement of data security for all owners of proprietary data. Denise said networks need to see each other more as partners than as competitors. Adam asked for standardization in the coming year across the new addressable TV options. Grace pointed out how consumers' cross-media behavior is ahead of the industry, but compared cross-media measurement to the "red pill" of the Matrix, in which marketers will then know the truth about their marketing, but will have to deal with the consequences.

TV/PREMIUM VIDEO DATA INTEROPERABILITY: Where are we now?

Jonathan Steuer, EVP, TV Strategy & Currency at VideoAmp, who was a consultant to CIMM and EY during the project on TV Data Interoperability & ID Resolution, moderated a panel with more of the technical participants, including Claudio Marcus, VP, Strategy, Comcast Advertising; Zeev Neumeier, Chief Innovation Officer, VIZIO; Mike Dean, SVP, Advanced Advertising, ViacomCBS; and David Levy, CEO of OpenAP. They also spoke about how progress is being made with bringing more TV data to market, but that there still isn't an end-to-end solution for buyers.

Zeev pointed out that Vizio can deduplicate reach across linear and streaming TV, but just on the Vizio platform. Mike spoke about ViacomCBS's ability to provide audience based buying through Viacom Vantage and even to provide cross-media measurement to buyers, but just for inventory from ViacomCBS. David spoke about the progress OpenAP has made in delivering standardized audience-based buying segments across inventory for their partners, but still not across the entire industry. Claudio pointed out the challenge in reconciling household tuning with persons viewing data, and the challenge in accounting for co-viewing when compared to digital platforms. Zeev also encouraged the adoption of standardized metadata, especially Ad-ID, by saying "Just Use It, Dammit!"

BEYOND ORIGINALS: Drivers of Audience Growth and Retention in Streaming Video

Mike Bloxham, SVP, Global Media Entertainment at Magid, interviewed Natasha Hritzuk, VP, Consumer Insights at HBOMax, about the new relationships that media companies are forming with their DTC subscribers. Challenges such as churn, retention, customer experience and brand loyalty are becoming as important, if not more so, than measuring programming and ads. Mike shared data from recent Magid research which said: 1) 35% of those who sign up for a streaming app only intend to subscribe for 6 months or less; 2) 55% of those who cancel a streaming service return due to getting a good deal or to watch specific new content. Natasha spoke about segmenting subscribers to better understand the needs of high-value customers, and to test marketing tactics, such as differential pricing, personalization

and content recommendations. She also spoke about the likelihood that streaming apps will introduce new forms of content, such as games, short form video and interactivity, which will be needed to maintain the “stickiness” for subscribers to maintain loyalty to streaming brands.

PROGRESS IN ADDRESSABLE TV: Changing TV Ad Sales and Measurement

Jon Watts, director of a new industry Think Tank to be announced soon, and long-standing media industry consultant, moderated a panel with MVPDs and TV OEMs who are expanding their ad inventory to provide addressable advertising for national programmers. Panelists included Rob Klippel, SVP, Advanced Advertising Products & Strategy at Charter Communications; Kevin Arrix, SVP, Dish Media, Dish Network; Adam Gaynor, VP, Network Partnerships & Head of Addressable, VIZIO; and Kelly Abcarian, General Manager, Advanced Video Advertising Group, Nielsen.

Both Rob and Kevin spoke about the success that MVPDs have had with audience targeting and frequency management, as use cases for addressable advertising in the two minutes of local advertising each hour, but that they are now focused on unlocking these capabilities for the 14 minutes of inventory available to the national programmers through the On Addressability initiative. Adam and Kelly touted the success of their tests and current rollout to deliver DAI into Smart TVs. They emphasized the need for interoperability and standards across all forms of TV addressability in order to offer scale to buyers. Additionally, Adam pointed out the ability of Smart TV data to measure any content/ads that “hit the screen,” which enables them to do cross-platform measurement and frequency management. Panelists ended up by forecasting that about 20% of TV inventory will be addressable by the end of 2021.

FIRESIDE CHAT: John Halley, COO, Ad Revenue & EVP, Advanced Marketing Solutions, ViacomCBS

For the closing Fireside Chat for Day 1, Brian Steinberg, Senior TV Editor at Variety interviewed John Halley, COO, Ad Revenue & EVP, Advanced Marketing Solutions at ViacomCBS. John spoke about changes occurring in TV currency, and how he’s impressed with the advanced planning systems in development at agencies that can allocate media according to high-value customer segments. He pointed out that, in response, ViacomCBS has had to revamp their traffic and billing systems to handle more than one currency.

John emphasized that networks are becoming more focused on the needs of different advertisers and offering more tailored solutions, and that it helps for media companies to have large scale in order to target as many small consumer segments as possible. The future will be about maintaining the reach and brand-safe context of TV, but introducing the data-driven technology practices that originated with digital media. He spoke about the way that both Viacom Vantage and OpenAP can deliver standardized audience segments across TV and digital inventory now, but that more collaboration is needed to make this process ubiquitous and easy for buyers across the entire TV/premium video ecosystem.

DAY 2: Thursday, February 4: 12:00-2:30pm

CIMM STUDY RELEASE: Best Practices in Combining Smart TV and STB Data

Howard Shimmel of Janus Strategy & Insights presented highlights of the study he just completed for CIMM in partnership with Gerard Broussard of Pre-Meditated Media. The study is now available for download from www.cimm-us.org. The goal was to assess the strengths and weaknesses of Smart TV (ACR) and STB data and identify best practices for combining them at the household level. Both datasets are complementary, and the combination comes closer to creating granular nationally representative data sets for linear and streaming TV programming and advertising use cases. The first phase was to review all Smart TV (ACR) and STB datasets to understand how the data are captured and edited and the

size of various data footprints. The second phase was to identify best practices among companies who are co-mingling datasets. Some of the best practices highlighted were:

- Recognize diversity of household TV access on tuning behaviors that reflect changing landscape of TV viewing, and apply consistent definition and sample inclusion of Over-The-Air, Pay TV and Broadband-Only homes
- Use tuning data from homes with Set Top Box-to-Smart TV ACR device matches to inform calibration of combined data set estimates, including un-matched homes. Deploy high quality matching agent, able to match on postal and IP address
- Leverage HH device graph to ensure representation of Over-The-Air, Pay TV and Broadband-Only homes
- Ask IP match provider questions regarding quality of data records such as recency, churn rate, deterministic vs. probabilistic, life span, etc.
- Use the STB data to calibrate Smart TV (ACR) data to adjust for number of sets in home, DVR/VOD, backfill reference for ACR signature library
- Use the Smart TV (ACR) data to adjust the STB data for CTV access/tuning, set-on/set off, on-screen ad exposure
- Apply weights for demographics, TV access universe, tuning metrics, geographics

CIMM STUDY DISCUSSION PANEL: Lessons in Creating Scaled and Representative Granular TV Datasets

Following the short summary of key findings from Howard, Gerard Broussard of Pre-Meditated Media moderated a panel representing companies who are currently commingling Smart TV (ACR) and STB data, including Caroline Horner, SVP, Product Management, 605; Josh Chasin, Chief Measurability Officer, VideoAmp; David Algranati, Chief Product Officer, Comscore; and Tom Weiss, Chief Data Scientist, MarketCast (formerly Deductive). Tom started out by explaining some of the limitations with each dataset, including that Smart TV (ACR) data knows everything that “hits the screen,” but only if it can find a match in the reference database, and it can’t identify the “source” of the ad/content.

David pointed out both Smart TV and STB data were originally engineered for different purposes, so audience measurement is a by-product. Caroline added that this makes it difficult to standardize the data at the point of collection, but that standardization can be accomplished by vendors during processing. Josh made the point that more progress has been made in standardizing the editing and processing rules for STB data, since it’s been available for longer, but that vendors are still catching up in standardizing Smart TV data. He also pointed to the need to standardize metadata and market definitions, as well as the Universe Estimates for different types of TV set-ups in the home. In this regard, the ARF Universe Estimate Study will help, and Comscore is offering their market definitions for industry standardization. The conclusion of panelists was that it may still be too early to impose standards on the process of integrating both datasets, but that innovation and best practices should be encouraged in the meantime.

FIREMOUNT CHAT: Update on Amazon’s OTT Advertising

Scott McDonald, CEO and President of the Advertising Research Foundation interviewed Maggie Zhang, Head of OTT Measurement & Research at Amazon Advertising. Maggie outlined the OTT inventory available to Amazon, including their owned & operated AVOD app IMDB TV, as well as other F.A.S.T (Free Ad Supported TV) channels on Fire TV and Amazon Prime Video platforms. She explained the role of research as using Amazon’s data to provide audience insights and to create audience segments, as well as to conduct campaign analysis, sometimes via integrations with third party vendors such as Nielsen and Kantar. As in most ad sales research, the goal is to help buyers differentiate the impact on business outcomes of media purchased on Amazon vs. other sources.

TV PLATFORM'S AD BUSINESS: How is it evolving?

Howard Shimmel of Janus Strategy & Insights conducted a panel with representatives from the emerging major new TV ad platforms, including OEMs: VIZIO, Samsung and LG, as well as Roku with its OS in various TVs combined with its streaming platform. Panelists included Justin Evans, Global Head of Analytics & Insights, Samsung Ads; Dan Robbins, VP, Ad Marketing & Partner Solutions, Roku; Matt Durgin, Senior Director, Smart TV Business Team Leader, LGE North America, LG Electronics; and Adam Bergman, VP, Brand & Agency Partnerships, VIZIO. Each platform described how their access to TV ACR data has enabled them to create new advertising businesses with the ability for targeting and measurement within their platforms. Increasingly, they have inventory available on F.A.S.T. channels that can reach “cord cutters,” who are spending an increased amount of time on all streaming platforms and can't be reached on linear TV.

Panelists pointed out that they have unique audiences not available elsewhere. Samsung Ads offers inventory across linear and mobile, whereas Roku can also offer it across both linear and streaming. When Howard asked if they are all becoming “walled gardens,” Dan pointed out that Roku has developed third party measurement products with Nielsen. Justin recognized the value of syndicated measurement, but sees it as complementary to the deeper insights available on his proprietary platform. Matt pointed out that LG acquired Alphonso as a measurement partner, and also that some of LG's best customers are entertainment companies who are looking for outcomes within the LG platform. Adam concurred that each advertiser and agency has a unique perspective, and that VIZIO licenses its data widely in the industry and participates in collaborative data sharing partnerships.

TUTORIAL: Virtual IDs and Private Sketches for Data-Protected ID Resolution

Ron Pinelli of the Media Rating Council provided an introduction to Virtual IDs, which is a proposed secure method for deduplicating reach between digital platforms and also between TV and digital media. It is one of the features of the WFA's Technical Blueprint for Cross-Media Measurement. He pointed out that VID is like an ID graph that is trained using a single source panel, and then used to assign records to demographic or behavioral groups. It enables record level data instances to be assigned to cohorts to estimate deduplicated reach for that cohort across platforms. However, Ron made it clear that VIDs cannot be used for re-identification of individuals to permit targeting or outcomes measurement. He also pointed out that VIDs need to be tested to determine if they can work with granular TV data in the same way they work with digital census data, since TV data is at the household level vs. digital data which is at the individual or device level. He also made the point that refreshing the training dataset is important since it determines the accuracy of assigning the VIDs to the right cohorts. These investigations are being planned in the ANA Pilot Tests for their Cross-Media Measurement initiative in the U.S.

MAKING PROGRESS DEDUPLICATING REACH: Update on ANA's Cross-Media Measurement Initiative

Ron was joined by Artie Bulgrin, consultant to the ANA's Cross-Media Measurement Initiative, to further explain the proposed Blueprint for ANA Pilot Tests. Artie reiterated the importance of having the initiative led by marketers, because they have a consumer-centric perspective, and they need comparable, objective and transparent measurement across all media. He also emphasized that the solution is being designed to enable planning and optimization to deduplicate reach across TV and digital platforms, to enable full campaign evaluation and to enable measurement of outcomes, even if the initial Pilot Test may not be able to meet all objectives.

Then Ron showed diagrams of the full cross-media measurement design, which incorporates granular TV data from Smart TVs and Set-Top Boxes, along with a single-source calibration panel (or linked TV and digital panels), which then applies the VID model, creates private sketches and measures the deduplicated reach across these sketches or cohorts. Artie also described the different workstreams

currently in progress at both the WFA and the ANA to assemble the building blocks and Pilot Test the Blueprint.

Artie then brought out his panelists: Tony Fagan, VP, Research at Google; Kavita Vazirani, EVP, Insights & Measurement, NBCUniversal; and Kanishka Das (K.D.), Senior Director, Global Media Accelerator at P&G. KD pointed out the importance of this initiative for marketers and the challenges they have with understanding reach across so many media platforms. Kavita spoke about all the progress NBCU is making with deduplicating reach across their properties, with the launch of CFlight and now OnePlatform, but made the point that the networks support the objectives of the marketers in the ANA initiative, even if details of the design still need to be tested to incorporate TV. Tony emphasized that the components of the design will be “open-sourced” and made available globally for consistency, and reiterated that this design is the safest way for “data owners” to protect the security of their data, while also meeting the needs of the advertisers. He said that the vendor selection will proceed fairly, and there will be validation as part of the Pilot Test.

DATA QUALITY IN ID RESOLUTION: How do ID Matching Methods Impact Measurement? What’s next?

Alice Sylvester continued the discussion about identity resolution with her panelists who represented a range of ID vendors: Jason Manningham, CEO, Blockgraph; Matt Emans, Co-Founder and Chief Technology Officer, Data+Math, LiveRamp; Aimee Irwin, VP, Strategy, Experian Marketing Services; and Richard Lloyd, Global Head of Product & Solutions, InfoSum. Matt explained that LiveRamp provides “safe haven” data matching capabilities in a neutral ecosystem to connect online and offline identity, but without the use of a centralized ID graph. LiveRamp assigns their IDLs (Identity Links), which then act as a cookie. They also offer ATS (Authenticated Traffic Solution) which allows owners of first party data to connect their data securely with other first party in a P2P (“peer-to-peer”) manner. This is a decentralized “privacy-by-design” approach.

Jason pointed out that his data owners (MVPDs/ISPs) also need to control the sharing of their IP address data, so Blockgraph provides a secure approach. He pointed out that more than one ID will be needed in the advertising and marketing ecosystem, since different IDs work better in different environments. Most agencies currently work with at least four ID providers now. Aimee made the point that clients need to remember to assess the quality of data that are matched, as the industry moves away from curated panels. Better understanding is needed of the definitions for match rates vs. accuracy. Richard explained that InfoSum doesn’t have an ID graph, but rather a secure way for data owners to collaboratively share data via secure “bunkers,” which become part of a client’s data structure. Bunkers are then connected using data encryption techniques so they can’t be resolved back to the individual data components. Everyone agreed that more discussion is needed to improve industry understanding of use cases for different techniques of ID resolution. As Jane Clarke transitioned to the last session, she promised to hold another Workshop on this topic soon.

FIRESIDE CHAT: 2021 and Beyond?

For the last session in the 2-day program, Suzanne Vranica, Advertising Editor of the Wall Street Journal chatted with Rishad Tocaccowala, Author of *Restoring the Soul of Business: Staying Human in an Age of Data* and Senior Advisor to PublicisGroup, where he worked for many years. Rishad also publishes a weekly blog called “The Future Doesn’t Fit Into the Containers of the Past,” which is highly recommended reading for its insights into business, culture and careers. He pointed out that companies/employers will need to rethink all business processes after covid, since 18 months of changed behavior will create permanent changes. This is because:

- 1) The market has changed, which is being led by changing consumer behavior;

- 2) Technology has changed, since we've seen approximately an eight year acceleration in e-commerce, streaming media and remote work;
- 3) The role of companies in society has changed, since companies now need to demonstrate their purpose in serving society as well as creating revenue for shareholders. Consumers want to know what companies are doing to keep them safe, to make their families secure and to help the economy and society return to a better place.

Rishad emphasized the inequality of the “K-shaped” recovery, and that this foreshadows the rise of unions that can bring greater attention to front-line “essential” workers. He also pointed out that the idea of companies having a headquarters in a physical location may no longer be necessary. Workers want to stay close to their home and families, but could come to physical locations every few weeks to meet with colleagues and customers. He said it will be challenging to maintain the “pomp and circumstance” of events such as Cannes Lions and corporate entertainment.

He identified three challenges that are important for marketers to address:

- 1) Recognize the power of the walled gardens and that they're not in business to help marketers;
- 2) Data and technology aren't differentiators anymore, since they've become a commodity, like electricity;
- 3) The customer is a citizen who can weaponize social media, in ways that can both help and harm big companies.

He pointed out that covid has caused corporate boards to wake up to these challenges, and that they now need to create short (1-year), medium (3-year) and long-term (5 year) strategies to address them. This includes how to lobby for the regulation of “big tech,” as well as managing relationships with new technology platforms; creating more direct-to-consumer “data” relationships; and prioritizing the privacy-safe data exchange with both customers and partners. Addressing these issues should have the effect of bumping the CMO into the Board Room. Finally, companies need to address their societal role with their own employees, which will become critical to having an engaged workforce in the future.