

2.3 + 2.4
2021



Virtual Cross-Platform Video Measurement & Data Summit

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WELCOME:

Industry Progress Report



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CIMM



2021 SUMMIT

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CIMM VISION/ROADMAP



- Understand & address cross media behavior by segment

- Unduplicated reach & frequency
- Comparable metrics

- Measure impact

**Optimization, Activation & Attribution Platforms
For Cross-Platform TV/Video**

Cross-Media Measurement Building Blocks

1. **TV “census-like” data:** Standardized Smart TV & STB content/ad data; with national representativity & scale
2. **Digital census data:** Standardized app/digital video content/ad exposure data
3. **Cross-Media or “Linked” Panel:** demos, VPVH (co-viewing), OTA viewing and calibration of “census” data
4. **ID Resolution:** solutions for households and individuals

PROGRESS IS BEING MADE IN ALL AREAS; BUT MUCH MORE NEEDS TO BE DONE



INDUSTRY PROGRESS REPORT

- **MRC** released cross-media “ad impressions” standard, with updates coming on duration reporting; goal is common metrics
- **Nielsen** introduced streaming measurement and announced Nielsen One will launch in 2024
- The **WFA** released its Global Framework for Cross-Media Measurement and Technical Blueprint; Pilot Tests in planning by **ISBA** in U.K. and **ANA** in U.S.
- **IAB/Tech Lab** launched initiatives to replace “cookies”
- **Media companies, MVPD’s & vendors** continued developing proprietary solutions for cross-media measurement, attribution and ID resolution



2020 INITIATIVES BY COMMITTEE

1. **Attribution & ROI**: Completed Study to *Unpack Data Inputs into TV Attribution* (Sequent/Janus)
 - Analyzed six campaigns for 9 providers to unpack differences in ad occurrence & TV exposure data
 - Learned why results are different from different vendors
 - Findings include need to improve ad occurrence measurement and reinforced value of combining Smart TV and STB data for scaled datasets that are more nationally representative



2020 INITIATIVES BY COMMITTEE

2. Advanced TV & Data: Completed: **Best Practices in Combining STB & Smart TV Data** (Pre-Meditated Media & Janus) to enable TV tuning datasets that are more nationally-representative:

- Learned about strengths/weaknesses & gaps in both complementary datasets
- Created best practices

2020 INITIATIVES BY COMMITTEE

3. Advertising Metadata Standardization Initiative

(AMSI): Collaboration with analytics and ad measurement firms & industry associations

- Standardize ad names, metadata and file formats across digital and TV to more efficiently enable holistic analysis of ad campaign ROI/ROAS
- Hosted ARF Town Hall on 10/20; now supporting datascape with IAB Tech Lab and MRC



2020 INITIATIVES BY COMMITTEE

4. Cross Media Measurement: EY Completed: **TV Data Interoperability & ID Resolution Design Initiative** (from Future of Television (FoT) Workshops)

- EY Interviews/Workshop created potential solution concepts & related business & technical requirements
- Posted to CIMM site to encourage use by all vendors

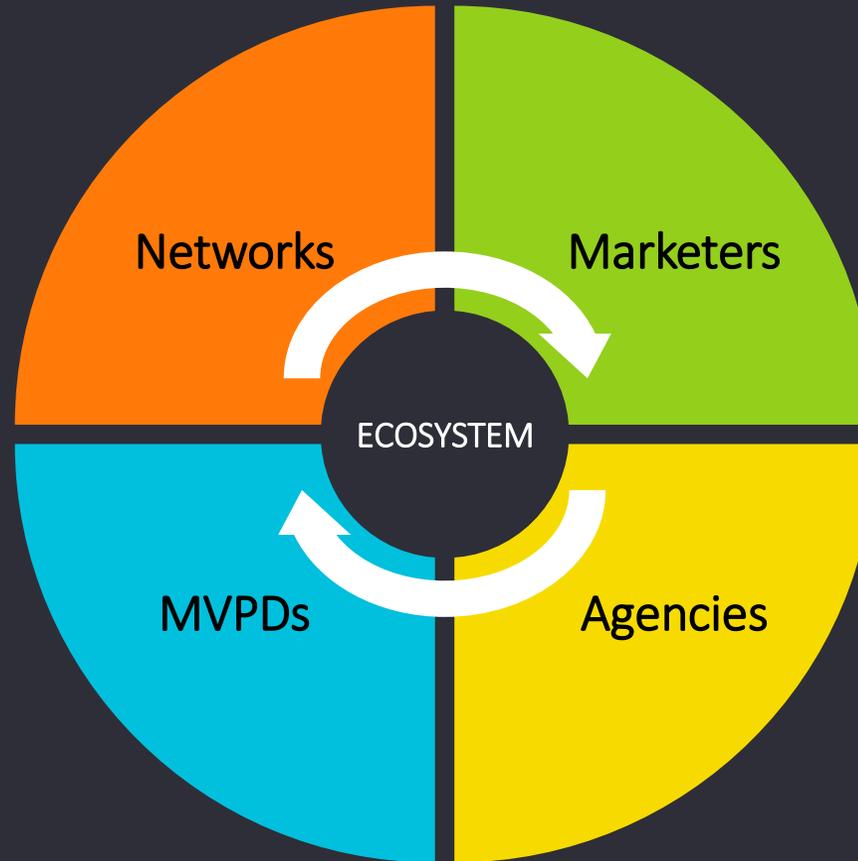


Interviewees during the engagement articulated a need to solve for data interoperability and household ID resolution

HIGH-LEVEL INTERVIEW FINDINGS

Ad revenue is threatened by linear ratings declines and competition from digital players better able to measure results and outcomes. Each network is innovating individually and many are also working as part of various collective innovation efforts. Strategic and operational challenges share many commonalities.

MVPDs need to solve for the same ad revenue challenges as networks as they compete in national, regional and local advertising marketplaces and also will be thoughtful about what data to contribute.



Marketers still need both mass reach and targeted mass reach from television, but need it to be easier to buy consumers, agnostic of screens, and be able to have more end-to-end measurability.

Agencies are unlikely to drive the change to a new industry-wide tech stack despite their current influence over television buying given that networks, marketers, and MVPDs are more core to the solution enablement. However, they are supportive of an industry solution and do not believe it will obstruct their competitive differentiation.

EVERYONE IS INNOVATING INDIVIDUALLY BUT HAS INTEREST IN SOME LEVEL OF COLLECTIVE SOLUTION

Interviewees also emphasized that there are different universes of inventory informed by data across the industry, but no unified end-to-end buy-side view

HIGH-LEVEL INTERVIEW FINDINGS

HIGHLY ILLUSTRATIVE VIEW OF INDUSTRY COMPLEXITY ACROSS VIDEO INVENTORY INFORMED BY DATA



Network innovation



MVPD innovation

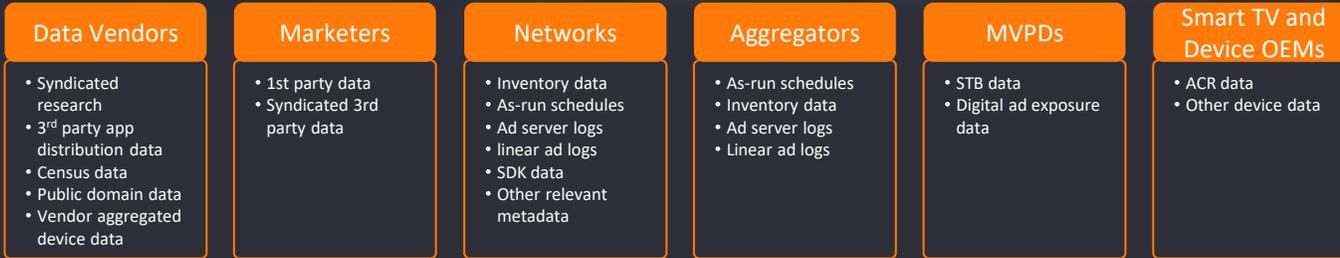


No ability to understand reach + frequency across the full universe of television advertising options

Our conversation during the workshop presented both centralized and decentralized options, but gravitated towards decentralized

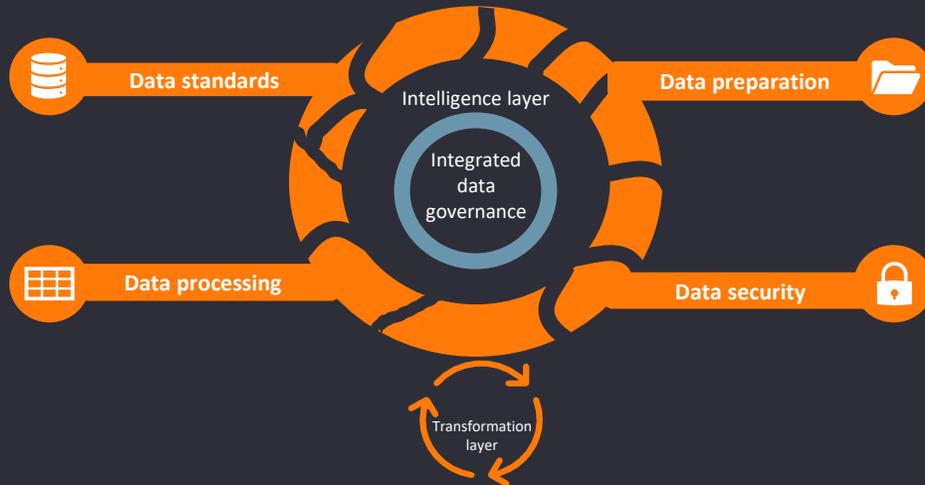
WORKSHOP OUTPUT

ORIGINATING DATA SOURCES

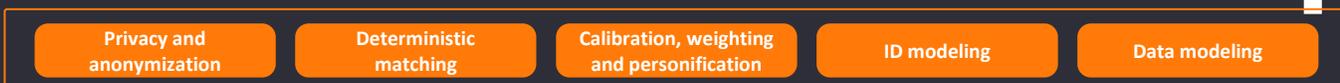


Opt in/out functionality for any 1P data

BUSINESS RULES MODULE



HH ID RESOLUTION MODULE

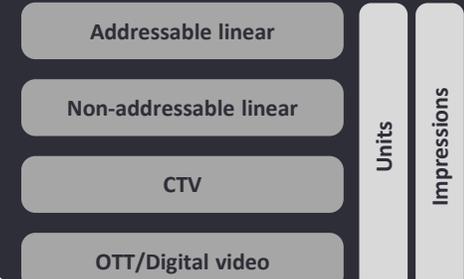


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Out of scope for the initial solution

ACTIVATION MODULE



Continuous Improvement Loop

ASSESSMENT MODULE



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