

# STRATEGIC REVIEW OF CONTENT MEASUREMENT

Executive Summary

October 2024





# Executive Summary



In search of improvements in content measurement, CIMM convened a working group of programming executives at major U.S. publishers to define content measurement and the main use cases that would help measurement providers understand their needs. This initiative was prompted by gaps in viewership data at the program and title-level, particularly in the streaming space.

*The Working Group’s description of Content Use Cases is incredibly valuable. It has become our roadmap to guide our product plans and improve content measurement.*



– Measurement Vendor

The working group’s Report, available through CIMM<sup>1</sup>, defined content measurement as helping programmers *understand who, how and when audiences are consuming video content, by episode and title across all distribution platforms, over time*. It is essential to manage the content lifecycle and inform decisions about content development, scheduling and windowing strategy, business development and monetization strategy, direct-to-consumer (DTC) customer acquisition, retention and marketing, and supporting external business partners and communications. This Report seeks to establish solutions for moving content measurement closer towards an ideal state envisioned by the working group.

This Report undertook a strategic review of content measurement, including building a CIMMscape of vendors in the content measurement ecosystem and conducting a strategic review, detailing both requirements and a solutions architecture, to meet one of the most challenging use cases: measuring viewer journeys.

1 Coalition for Innovative Media Measurement (CIMM), Strategic Review of Content Measurement, October 2024

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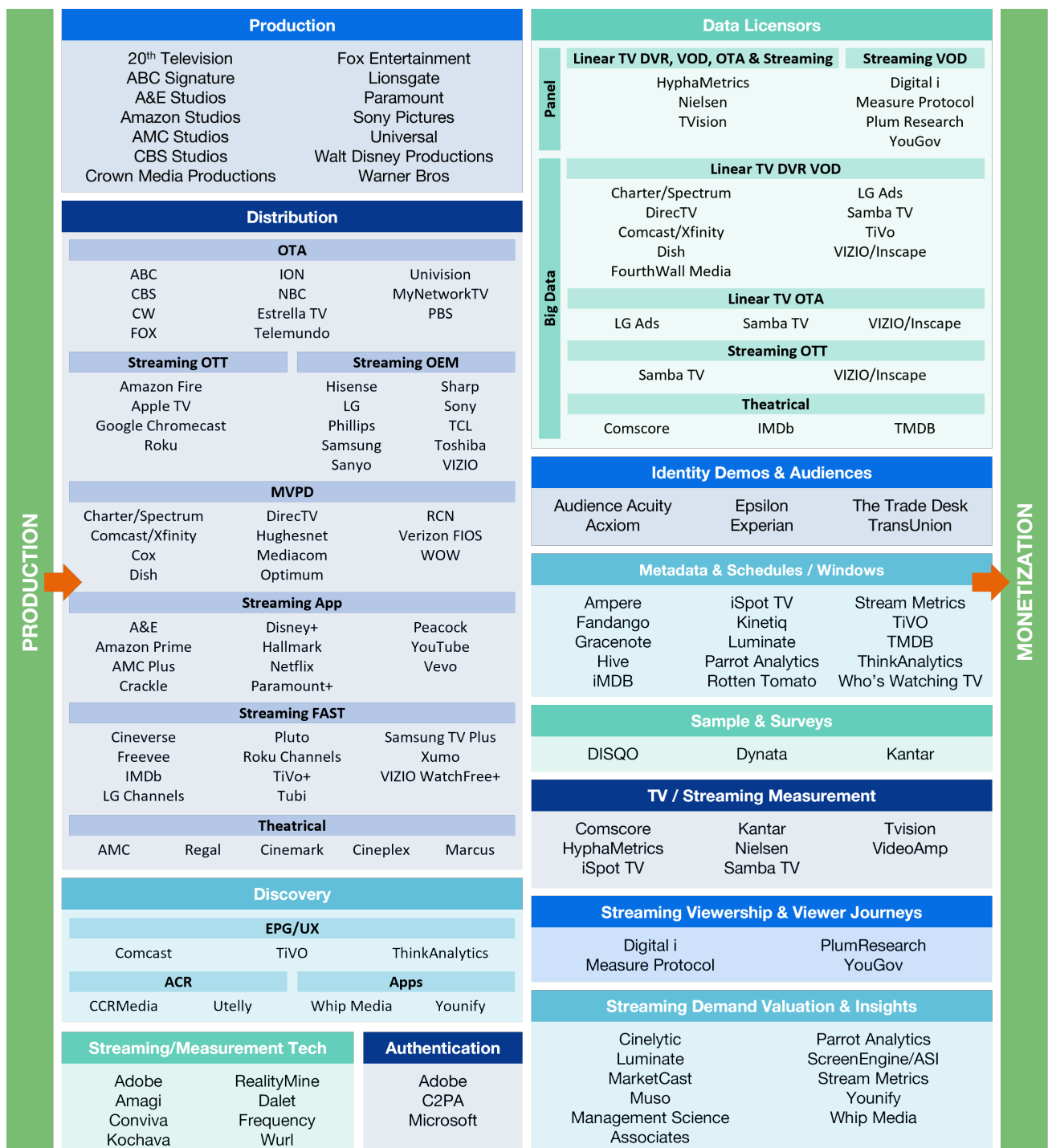
The CIMMScope gives us a snapshot of the vendor landscape and the component parts that need to go into content measurement. It's a great starting point to understand the overall industry and who the players are.



– Major Publisher

The CIMMScope is designed to provide a snapshot of the content measurement vendor landscape, organizing companies into specific industry categories within the content measurement ecosystem in a single view. It's designed to help identify companies with potential to improve content measurement. This content CIMMScope is a first for the industry but may not include all vendors and can be improved over time. Requests for copies should be directed to CIMM.

## CIMMScope: The Content Measurement Vendor Landscape



## Requirements that Prioritize Viewer Journeys

- 1 Meet main use case requirements
- 2 Feasible and pragmatic
- 3 Achievable timing
- 4 Phased approach
- 5 Affordable cost

- Persons
- Streaming and linear TV
- Title, series and episode-level visibility
- All devices and access methods
- Syndicates reporting
- Over time
- Representative
- At scale

The strategic review uncovered requirements and a solutions architecture to better understand content viewer journeys, to track viewing across linear and streaming content over time. The Report found that no one vendor offers a comprehensive content measurement solution. If current solutions were improved and used in concert with one another, programmers would have better measurement to fuel content decisions.

Improving complementary data building blocks and using them together is the foundation for improving content measurement. Achieving representation, scale and streaming title visibility are three important requirements for better content measurement. Data building blocks were identified that each achieve some but not all of the requirements. Panels may be representative but don't necessarily have scale. Big data has scale but often lacks representation. Visibility at the title level is critical. Contact CIMM for more information about Smart TV/ACR and Set Top Box (STB) data in measurement solutions<sup>2,3</sup>.

## Data Building Blocks and Complementary Benefits

	Cross Platform Panel	Streaming Only Panel	Big Data	Federated Data
Representation				
Scale				
Title Visibility				

2 Coalition for Innovative Media Measurement CIMM Convergent TV Measurement Guide 2023, [cimm-us.org](http://cimm-us.org)

3 Coalition for Innovative Media Measurement CIMM Smart(er) TV Data for Measurement Report, February 2024, [CIMM-Smarter-TV-Data-2024.pdf \(cimm-us.org\)](http://CIMM-Smarter-TV-Data-2024.pdf)

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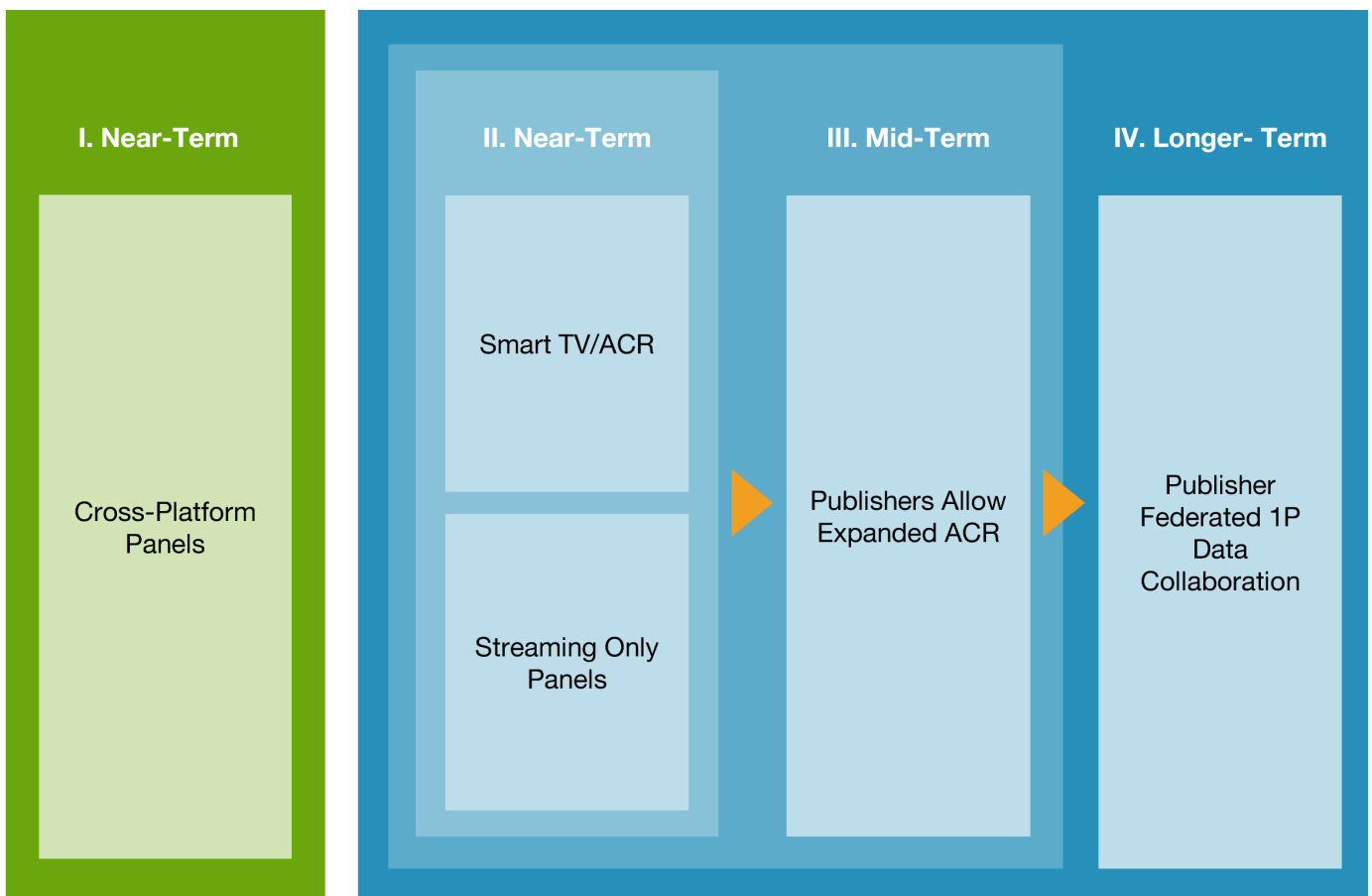
This Report uncovers a solutions architecture to address gaps in representation, scale and streaming title visibility in an ecosystem where streaming and linear TV are both measurement imperatives. Several recommendations to improve content measurement are offered.

### Recommendations:

- I. Continue to improve cross-platform panels.** Cross-platform panels, including the incumbent currency measurement panel, capture linear TV and streaming consumption from the same panelists.

They have historically provided the foundation for content measurement. Collecting streaming consumption from more panelists, capturing title-level visibility for more mobile and PC/desktop consumption, and distinguishing between ad-supported and non-ad supported content are some of the recommended improvements.

### Phased Solutions to Improve Content Measurement



- II. Invest in Streaming Only panels.** The emergence of Streaming Only panels is an important development for filling in content-measurement gaps, because these panels can collect and report streaming publishers and titles, unrestricted by agreements with streaming app owners. Title-level consumption is captured from all devices, including Smart TVs, mobile phones and PC/desktops. Improving panel representation and increasing the number of reported streaming apps are recommended improvements. When used in conjunction with Smart TV/ACR data,

streaming only panels have the potential to more comprehensively measure viewer journeys at scale.

*The report identifies streaming data sources and services we frankly didn't know about. If we did know about them, it's clear we can improve them to use them across more of our use cases.*

– Major Publisher





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- III. **Enable more streaming coverage by Smart TV/ ACR data providers.** Today, due to contractual agreements between streaming app owners and TV set manufacturers, streaming viewership data captured using automated content recognition (ACR) technology on Smart TV sets is limited to OTT streaming consumption (e.g., through devices such as Apple TV, Chromecast, Fire Stick or Roku). Content libraries for streaming may also be limited. Streaming app owners should consider allowing collection of native app streaming consumption by ACR data providers, sharing content in advance with providers to beef up ACR content libraries, and agreeing on the ‘rules of engagement’ including data access by other publishers. Enabling more comprehensive streaming coverage in existing ACR data could be a first step to more robust data collaboration across publishers to achieve their business goals.

*If there's moving forward on data collaboration, that would be an outstanding outcome of this project. We'd love to see a framework for publishers to allow more data collection and to share metadata with us. That would really improve measurement.*

– TV/Streaming Data Licensor

- IV. **Establish a federated first-party data collaboration framework.** A data collaboration framework would enable publishers to access measurements derived from streaming app owner first-party data while at the same time adhering to privacy, security and other requirements. The payoff is clear: publishers could gain more accuracy, more scale, more transparency and more control. To be successful, details about governance, data collection and aggregation, definitions, identity solutions, privacy, audit, technology and access rules would need to be agreed upon, which will

likely require a longer time horizon than other solutions. Even when federated approaches are adopted and the advantages are realized, we envision third-party solutions, including big data, Streaming Only panels and Cross-Platform panels, as critical components of content measurement.

*Data collaboration is such an important topic to future-proof content measurement. This report will help us publishers move forward, especially to work through the very detail questions that are needed to make it work.*

– Major Publisher

Achieving better content measurement requires a building-block approach and cross-publisher collaboration. Programmer decisions about content are complex and cover a wide range of use cases including creation, licensing, distribution, windowing, valuation and other critical decisions. Publishers realize no one solution can deliver all content use cases, and that achieving their vision and measuring viewer journeys – using data that are representative, at scale, persons-level, longitudinal, title-level, covering streaming and linear TV - sets a very high bar for delivery.

This Report identifies key building blocks required to establish a more robust set of content measurement solutions. We believe that solutions based on third-party data building blocks can be improved and made available in a relatively short time horizon. Solutions that require federated data collaborations across publishers will deliver more benefits but are more complex and expected to take more time. We urge our programmer partners to prioritize partnerships with content measurement vendors and to support and participate in a federated data collaboration framework to make more robust content measurement a reality for publishers and the industry.



# About the Report

This Report is based on guidance from CIMM, input and insights from executives from major U.S. publishers who comprised the Project Steering Group, and over 30 in-depth hour-long interviews with executives from a wide range of companies supporting content measurement. The quotes herein are designed to be illustrative. This Report should be read as representing the current state as of September 2024.

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## About CIMM

The Coalition for Innovative Media Measurement is a non-partisan, pan-industry subsidiary of the Advertising Research Foundation, focused on cultivating and supporting improvements, best practices and innovations in measurement and currency, data collaboration and enablement, and the use of new metrics and approaches to understanding the value of media. CIMM embraces the entire media and advertising ecosystem and prioritizes effective collaboration to deliver meaningful change. To find out more, contact: [info@cimm-us.org](mailto:info@cimm-us.org).

## Disclaimer

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