

# Coming Together:

## An ambitious vision and plan for the future of the US JIC

By Jonathan Steuer and Julian Zilberbrand

June 2025

A paper for CIMM



# CONTENTS

Approach	4
About the Authors	4
About CIMM	5
Foreword	5
Executive Summary	6
Introduction	8
1. Market Context: TV and Measurement have Evolved Together	10
2. What is a JIC Anyway?	14
3. The US JIC - A Short History	19
4. Why does the US Market Need a JIC?	22
5. Barriers to Cooperation in the US Market	24
6. A Future Mission and Role for the US JIC	25
7. A Future Operating Model for the US JIC	28

This paper sets out an ambitious but, we believe, important vision for the future role of the US Joint Industry Committee (JIC). At a time when the US TV measurement market risks becoming increasingly fragmented and dysfunctional, we argue that a stronger JIC could help to stabilize the ecosystem, fostering trust and competition and ensuring that innovation thrives. We argue that the JIC must evolve to become a central enabler of the multi-currency marketplace, building common standards, shared infrastructure, and governance frameworks that serve the long-term interests of buyers, sellers, and consumers alike. Our proposals are designed to catalyze positive debate and drive meaningful industry action.

# Approach

The authors of this paper have extensive experience of the US TV marketplace, working for many of the largest enterprises, buy-side and sell-side, and with some of the most innovative companies operating in the measurement space. They have first-hand experience of some of the recent collaborative initiatives undertaken to deliver positive change in the US marketplace. Their experience spans both the strategic and operational aspects of implementing change in the industry.

The authors discussed their ideas and proposals with a range of stakeholders across the industry in Spring and Summer 2024, to test and refine their thinking, and also completed a series of working and editing sessions with CIMM's team between June 2024 and publication. In late 2024, the paper was reviewed and edited by the team at the US JIC, who provided helpful comments to ensure the factual accuracy of some of our statements about the US JIC.

The views and opinions expressed in this report are primarily those of the authors, and do not necessarily reflect the views or positions of any other individual or entity.

## About the Authors

**Jonathan Steuer** is an entrepreneur, researcher, innovator, and builder at the nexus of humans, media, technology, and business. He is currently the Chief Science Officer at Simulmedia, a pioneer in data-driven TV advertising. He also consults with and advises companies across the media and technology spaces, and is a frequent conference speaker, moderator, and panelist. Prior to his work on this paper, Jonathan recently co-authored the CIMM white paper, "Who's Counting? The future role and value of panels in US TV measurement."

In 2003, Jonathan co-founded Anonymous Media Research, where he has developed patented single-source cross-media audience measurement tools based on audio fingerprinting / pattern matching technology (9 US patents; others pending). He has held multiple leadership roles across the TV/media/research landscape, including EVP of TV Strategy & Currency at VideoAmp, Chief Research Officer at Omnicom Media Group, and as Chief Research Officer at TiVo. Steuer spent his early career as an entrepreneur at the origin of the commercial Internet, creating the pioneering online/offline social-media-based community Cyborganic, co-founding HotWired, the first banner-ad-supported website (1994), and leading the online launch team at CNET, the first integrated Web / TV programming venture (1995).

Jonathan holds a Ph.D. in Communication Theory and Research from Stanford University and an A.B. in Philosophy from Harvard College. He is the author of a still- widely-cited 1993 [academic paper on virtual reality](#). Jonathan originally hails from Milwaukee, Wisconsin and lives in the New York City's East Village.

**Julian Zilberbrand**, Global Head of Data Solutions at LG Ad Solutions, is an accomplished leader with a strong track record of success in adtech and martech, product development, measurement and marketplace strategy.

Prior to joining LG Ad Solutions, Zilberbrand was the CEO of Ivey Milton Consultants, a firm dedicated to guiding mid and early-stage companies through the intricate landscape of media, advertising, and technology. He has built an extensive career in senior leadership positions at Zenith, Starcom and Paramount, where he played a crucial role in diverse areas including the creation of an in-house media buying agency and the implementation of addressable TV strategies and business growth for Ad Sales. This came after an esteemed 11-year tenure at Publicis Groupe.

Known as a vocal and respected leader in the industry, Zilberbrand has received several industry recognitions from Ad Age, AdMonsters, TVOT and more, and is a frequent speaker at industry conferences for organizations including Beet.TV, CIMM, TVOT, and IAB. Zilberbrand has also held advisor roles for companies such as DoubleVerify, Innovid, SpotRunner, TVision, Adcuratio, and previously chaired the Media Rating Council's Digital Committee.

# About CIMM

The Coalition for Innovative Media Measurement (CIMM) is a non-partisan, pan-industry coalition of companies from across the media and advertising ecosystem, focused on supporting improvements, best practices and innovations in measurement and currency development, the use and application of new metrics and approaches to understanding the value of media, and data collaboration and enablement.

As part of its program, CIMM commissions papers, think pieces and perspectives from industry analysts, experts and thought leaders – to provide insights and occasionally provocative perspectives on critical issues of interest to our Coalition of members and to the wider industry.

The views, thoughts, and opinions expressed in this paper belong solely to those of the author(s) and do not necessarily reflect the opinions of CIMM, our members, any research interviewees or participants, any organizations named in the study, any current or former employers or employees of the author(s), or any other group or individual.

## Foreword

This paper presents an ambitious, even maximalist, vision for the future of the US Joint Industry Committee (JIC). It is not intended as a definitive blueprint, nor does it claim to offer the only path forward. Rather, it aims to catalyze positive discussion and debate about what a truly collaborative, effective JIC could look like in the unique and complex environment of the US media marketplace.

The ideas and proposals outlined here are designed to stretch thinking, challenge assumptions, and spark new conversations across the industry. We hope they will contribute to an open, constructive dialogue — one that engages stakeholders from every part of the media and advertising ecosystem, and helps the US marketplace continue to evolve in ways that serve the long-term interests of buyers, sellers, and consumers alike.

**Jon Watts, Managing Director, CIMM**

# Executive Summary

In January 2024, a group of major US TV networks and programmers – Fox, NBCUniversal, Paramount, TelevisaUnivision, and Warner Brothers Discovery – working under the auspices of [OpenAP](#) and in partnership with The [VAB](#), announced the [formation of a US Joint Industry Committee](#) (the US JIC).

In its founding announcement, the JIC outlined an initial set of priorities, focused on establishing a process for harmonizing streaming viewership data from participating programmers and making it available to certified measurement vendors and to agencies for planning and measurement use cases across streaming.

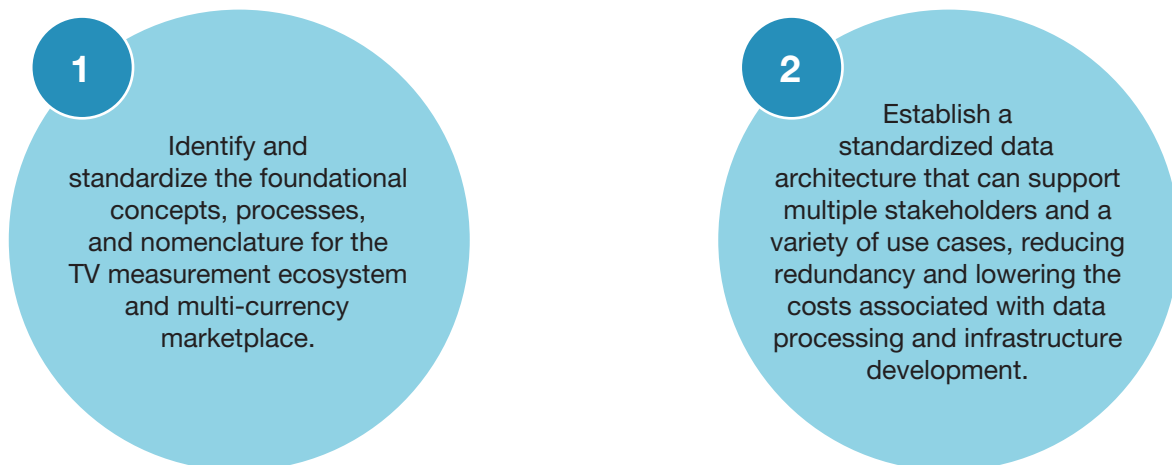
With its initial goals nearing completion or complete, what should the US JIC do next?

In a fast-changing marketplace, we believe strongly that the US TV measurement marketplace needs to embrace a diverse range of methodological innovations and new data sources, to provide advertisers, broadcasters, and content creators with comprehensive insights into audience engagement across the complex web of traditional and digital TV platforms. Although measurement vendors are making good progress, there remains significant work – and a growing recognition of the need for a strong pan-industry organization that can help to stabilize and support the growth and development of the multi-currency marketplace through a collaborative effort supported by buyers and sellers across the market.

We believe that the US JIC can and should strive to play this role, serving as a collaborative forum to accelerate solutions without relying on regulatory intervention or relying solely on accreditation and certification processes to do the heavy lifting required to stabilize and support the market. It's time for a truly collaborative logic to be applied to the US media and measurement marketplaces – offering simpler solutions to some of the industry's most pressing challenges, while still preserving competition and the ability to innovate.

Building on its existing certification program for measurement partners and the shared assets that have already been created, the JIC's role should be to facilitate and enable, rather than providing its own currency, serving as a connective tissue that allows the market to access information and innovate.

We argue that this should involve delivering a program of work that helps to:



These efforts would help competing measurement companies to create consistent, broadly comparable measurement solutions that help to build confidence and trust, helping to improve the economics of TV measurement, lowering barriers to entry and supporting innovation and competition.

There is no doubt that the mission and expanded role set out in this paper is ambitious and, quite possibly, out of reach – but it could be achievable, if the industry can come together. To succeed, the JIC will need to operate as a neutral, non-partisan and operationally-independent organization, committed to transparency and working with existing standards wherever possible. Perhaps most importantly, it will need to win comprehensive support from across the industry and to seek to address the needs of companies both large and small, buy-side and sell-side.

### Future Questions for Industry Debate

Our proposal for an ambitious future role for the JIC raises some important questions for the industry:

1

Does the industry agree that there is a strong and practical case for intervention in the US multi-currency marketplace?

2

If so, are the proposals outlined in this paper realistic, necessary and sufficient to support the positive future development of the multi-currency market?

3

Are the potential benefits of the expanded role for the US JIC sufficient to justify and attract new participants and additional investment? If not, what more is required?

4

How should the JIC work with other institutions, notably the MRC, the IAB Tech Lab and the ANA to deliver on its priorities and ensure alignment?



# Introduction

The US TV and video marketplace is arguably the world's most innovative, vibrant, and dynamic. However, in spite of – and perhaps because of – its global leadership in technology and content production, when it comes to collaboration and standard setting in audience measurement, the US does not lead the world. Most major media markets around the world have centralized organizations overseeing measurement, typically either a JIC (“Joint Industry Committee” or “Joint Industry Currency”) or a MOC (“Media Owners Committee”). Historically, the US has not had either.

The same combination of factors that creates an effective environment for media innovation – freedom of expression, personal and institutional wealth, intense competition, and light government regulation – have also, at least historically, created challenges for industry measurement collaboration. Indeed, one of the oft-cited historical reasons for the absence of a US JIC has been the claim that such an entity would run afoul of antitrust regulations – particularly ironic in the context of a country that has enabled near-monopolies in TV measurement, Internet search, and social media to flourish over the past two decades.

Amid continued calls for cooperation and collaboration across the industry, in January 2023, a group of major US TV networks and programmers – Fox, NBCUniversal, Paramount, TelevisaUnivision, and Warner Brothers Discovery – working under the auspices of [OpenAP](#) and in partnership with the [VAB](#), announced the [formation of a US Joint Industry Committee](#) (the “US JIC” in this paper), with the stated intention “to enable multiple media currencies, with the primary focus of creating a measurement certification process to establish the suitability of emerging cross-platform measurement solutions in advance of the 2024 upfront.”

In its [founding announcement](#), the US JIC outlined four priorities:



Establish and maintain a measurement certification process in partnership with the VAB that will be housed inside of the JIC for third-party measurement vendors conducting cross-platform premium video currency services that will be operational by Broadcast Year 2024.



Create a programmer data set to enable third-party measurement vendors by harmonizing streaming viewership data brought together by OpenAP infrastructure.



Engage a third-party audit firm to verify the accuracy of the streaming viewership dataset in order to maintain measurement independence and neutrality.



Collaborate with existing industry trade bodies such as the VAB and ANA, amongst others, to accelerate progress made to measurement calibration by all stakeholders in the industry.

Since then, the US JIC has successfully completed the first wave of its certification process (#1 above), is well on its way to creating and releasing a unified, validated streaming viewership dataset (#2 and #3), and, perhaps most importantly, is helping to drive a broader conversation about the need for, and demonstrating the possibility of, more effective collaboration in the US media ecosystem (arguably, #4).

We applaud the US JIC for achieving its stated goals, especially given that the organization has functioned to date without full-time staff, depending mostly on favors and on the willingness of participants to take on second (unpaid) jobs. But we also believe that there is more to be done, and that the industry has important and pressing needs, to support the development of solutions that meet unmet needs and to facilitate the evolution of a multi-currency marketplace.



### Our Goal: Explore What Happens Next

So, what happens next, now that the US JIC's initial goals are largely complete? This paper aims stimulate a positive, productive industry debate, by:

- 1 Examining the market conditions leading us to the current state of affairs in the US.
- 2 Exploring the roles of JICs and similar organizations in other countries.
- 3 Briefly explaining the role that the US JIC has played to date.
- 4 Setting out a series of practical steps that the US JIC could take to support the US marketplace.
- 5 Examining other US organizations to determine whether they deliver against these requirements.
- 6 Setting out a series of positive proposals for evolving the JIC's activities and operations in the future and outlining the potential next steps the industry might take to move toward a solution.

Importantly, this paper is intended to be a positive, constructive contribution to an important industry debate. We look forward to discussing our ideas and proposals with the industry.

### Disclaimer

The views and opinions expressed in this report are those of the authors, representing their own unique perspectives and distinctive voices, and do not necessarily reflect the views or positions of any other individual or entity, including CIMM. Neither CIMM nor the authors make any representations as to the accuracy or completeness of any information contained in this report or in any report or web site linked to in this report. Neither CIMM nor the authors will be liable for any errors or omissions in this information or for any losses, injuries, or damages incurred from the display or use of this information.

# 1. Market Context: TV and Measurement have Evolved Together

Let's look at US TV measurement over the last 70 years and take stock of where we are today. TV measurement, the foundation of media planning and advertising efficacy, has changed over time from traditional sampling methods to state of the art digital techniques. As new technologies come into the market and as consumption patterns continue to shift, we expect the evolution of measurement to continue, if not to accelerate. However, a quick review and a walk down memory lane is instructive to help us understand why the US measurement marketplace had evolved as slowly and haltingly as it has.

The history of TV measurement in the US (and, to a lesser extent, abroad) can't be told without exploring the history of Nielsen. In the 1950s, Nielsen developed "The Nielsen Television Index" (NTI), ushering in the use of "Nielsen ratings" to approximate audience sizes and demographics. Initially this service was dependent on paper diaries filled out by panelists. These ratings provided valuable information and insight into audience behavior and helped advertisers and broadcasters understand the marketing value of programs.<sup>1</sup>

Other countries developed similar audience measurement systems, leveraging diary-based methodologies and/or metered hardware attached to TVs as they became available. The late 1970s and early 1980s saw widespread advancements and the implementation of electronic "people meters" and similar devices, replacing paper diaries in the major markets; smaller markets used for more local media generally continued to rely on paper diaries for some time after. These meters automated the recording of TV tuning activity.

The addition of button-pushing and other methods for measuring whether humans were in the room, watching the TV set, provided a more accurate proxy for real-life TV viewing experience. Meters also provided more accurate and timely data than diaries. However, they were also far more expensive than paper-based diaries. The evolution and development of people meters has included things such as watermarking tech and the enablement of out-of-home (OOH) measurement capabilities via tools such as the "Arbitron-developed Portable People Meter." As time has passed, people meters have become a more efficient investment as well.

As the popularity of cable and satellite TV grew in the 1980s and 1990s, TV measurement expanded to include these new distribution outlets. Nielsen and other measurement companies created additional methods to track viewership across various channels and networks, which in turn necessitated larger sample sizes in order to measure viewership across the increasing number of channels.

However, the expansion of available channels from three major national networks in the 1970s to hundreds of channels by the mid-1990s made accurate measurement by panels alone increasingly untenable, because of the sample sizes required to adequately cover networks with small audiences. However, although the expansion of cable (and later satellite) TV viewing created measurement challenges, the new TV distribution platforms also enabled innovative new measurement methodologies and created new and potentially useful data sets.

It's perhaps worth noting that the US TV ecosystem is both large and complex. The interplay of these and other factors makes TV measurement in the US uniquely complicated compared to other countries: large households, often with multiple TV sets, hundreds of TV stations (if not thousands, in the world of FASTs), multiple TV distribution platforms (each with their own channel line-ups), extremely fragmented local TV broadcast (OTA) channels (including network affiliates, syndicated programming), MVPD footprints that vary geographically, fragmented STB technologies, 210 TV markets across 50 states (some including sparsely populated rural areas), complex demographics, and a diverse, multi-ethnic population.

By the early 2000s, data from digital cable/satellite set-top boxes ("STBs") became available commercially to measurement vendors, offering larger samples and more granular insights into viewing behaviors. However, these STB-based measurement methods were functionally limited to household-level granularity, due to the lack of any mechanism for measuring the presence of actual humans in the room.

---

<sup>1</sup> Nielsen's early dominance of the US media measurement marketplace and the power inherent in such a position did not go unnoticed. In the early 1960s, a US Congressional Committee explored the measurement ecosystem. Rather than directly regulating the industry, the hearings resulted in the formation of the [Media Rating Council](#) ("MRC") to establish minimum measurement standards, accredit measurement services, and audit the activities of those services. The MRC will be discussed in more detail below.

## 1. Market context: TV and measurement have evolved together

Unsurprisingly, consumer usage of these new STBs also created a new set of methodological challenges for measurement vendors. For example, a cable STB might return data even if the TV set is off, potentially inflating or destabilizing the data set. However, such issues could be overcome to some extent through clever math, and so companies like erinMedia and Rentrak developed early measurement solutions based on STB data.

The introduction of Digital Video Recorders (DVRs) in 1999, a technology that quickly scaled with consumers, enabled viewers to time-shift their TV consumption, to fast-forward, pause and rewind live broadcasts, and proactively skip commercials. Indeed, DVR pioneers TiVo and ReplayTV included buttons that could be used to skip ads with a single press, and TiVo later included functionality for skipping entire commercial pods, making ad-skipping incredibly prevalent (~80% skipped, for some programs) for users of these platforms.

Time-shifting created further challenges for measurement, as programs and ads were not necessarily viewed when they originally aired, and ad-skipping meant that measuring program viewership was no longer an accurate proxy for ad viewership. Nielsen and others developed solutions to address these challenges, such as “Live + 7” and “C3” ratings at the insistence of their advertising clients.

Starting in the early 2010s, US TVs started to integrate internet technology, [display sharing](#) via such tools as Chromecast, and streaming capabilities directly into the sets. The growth of Smart TV adoption and the development and integration of video Automated Content Recognition (ACR) technologies into new TV sets meant that by 2015, an increasing number of TVs were able to identify what programs and ads were likely displayed on screen (depending on the completeness and accuracy of the underlying reference databases). Although STB and Smart TV ACR datasets became more widely available, it took time for Nielsen to incorporate these new datasets into its measurement solution, which remained panel-based, until work on Nielsen ONE began in earnest. Newer measurement vendors seized the opportunity to develop solutions based largely on these new datasets, with small panels used for calibration purposes. New datasets have undoubtedly lowered barriers to entry in the US measurement marketplace and increased competition has undoubtedly stimulated innovations and improvements in measurement.

However, the US measurement marketplace remains extremely challenging for measurement providers and for marketers, with the growth of addressable TV advertising, the proliferation of TV channels and streaming services, far greater fragmentation of viewing, and the growing range of options for consuming TV and video, including Smart TVs and external CTV devices, as well as tablets, mobile phones, and laptops.

Furthermore, privacy regulations and changes to data collection practices increasingly impact TV measurement. Accurate identity resolution and matching are critical in combining big datasets, and though measurement companies are exploring alternative identity resolution methods and privacy-compliant solutions to address these challenges, there is currently no universally approved approach to managing identity resolution in the TV market.

As these profound changes were organically taking place, the US TV market was profoundly disrupted by the global pandemic, which resulted in a spike of TV content consumption from homes, further accelerating adoption of streaming services. Measurement companies were challenged with adapting even more quickly to incorporate streaming in order to provide comprehensive audience insights across platforms.

However, there were (and are) growing concerns among the major TV networks that syndicated measurement solutions systematically undercount audiences to their streaming services, in part because the streamers have generally refused to provide data to independent measurement providers. As viewing continues to shift towards streaming, this undercounting remains of great concern; the integration of publisher first-party streaming data into streaming solutions is now widely (but not universally) perceived to be a requirement for accuracy. The need for privacy - and business-rule-compliant methods to standardize and improve to streaming data for measurement purposes was one of the key factors driving the launch of the US JIC.

As the digital transformation of the television industry continues, investments in advanced measurement technologies, data, identity and advanced analytics remain high priorities for major media owners and measurement vendors ramping up to meet the evolving needs of advertisers and content providers. But there is still much work to be done.

# 1. Market context: TV and measurement have evolved together

## The Currency Wars Begin?

Despite the rapid pace of change in the TV marketplace, the primary data source for TV forecasting and measurement remains the Nielsen C3 currency that began life in 2009. In 2020, Nielsen announced its intention to launch a new measurement dataset, Nielsen ONE, that would incorporate big TV data sets (e.g. set-top box and Smart TV ACR data) and streaming data, replacing its legacy panel-only dataset with a new hybrid. Nielsen initially announced that it would sunset the legacy C3/C7 datasets in 2020, [but in 2023 walked back this plan](#).

The announcement created a new opportunity for alternative measurement providers, as it meant that the workflows and systems for forecasting, planning, buying and accounting for TV ad sales, based on Nielsen C3 data for over a decade, would need to be updated to support the transition to Nielsen ONE. This planned discontinuity created an opportunity for new measurement providers, whose methodologies were based on big TV data, to be integrated into agency planning and buying systems, potentially helping them to become scaled trading currencies for national TV inventory.

Despite the challenges of access to and integration of disparate TV data sets, over the last few years, measurement companies including VideoAmp, iSpot.tv, and Samba.tv have begun to make significant inroads into the TV measurement marketplace, joining Comscore, who gained STB-data-based TV measurement capabilities following their 2015 merger with Rentrak, which had given them solid standing in the local TV measurement marketplace. Over a billion dollars of venture capital / private equity investment has been poured into these companies over the past 10 years, and they are beginning to gain traction: some advertisers and networks have begun to transact TV on datasets other than Nielsen C3; in particular, as of this writing, data-driven linear advertising is now primarily transacted on non-Nielsen datasets.

In early 2025, Nielsen finally launched its new “Big Data + Panel” measurement capabilities, a component of its Nielsen ONE suite that combines data from multiple STB and Smart TV ACR datasets with its panel data from ~40,000 US households. This addition fast-forwards Nielsen ONE squarely into the competitive environment created by the upstarts during the time it was developing Nielsen ONE.

We, the authors, believe a company will maintain a core advantage in TV measurement if it has access to a high-quality panel that can generate calibration data critically important for modeling big-data TV datasets. Panels continue to deliver important benefits, including “personification” (knowing which individuals within the household are in front of screens measured with ACR and/or STB data), measuring OTA viewership and viewing by non-/under-represented groups, and helping to correct technographic skews/biases.<sup>2</sup> And the only other TV panel-based measurement provider in the US market, [TVision](#), has many impressive products based on its novel passive measurement technology, but has a much smaller panel size (~5,000 households).

Fielding and managing a high-quality panel is extremely expensive (\$50-100MM to get started). While industry participants could, in theory, collaborate to share the costs of creating a panel, various industry efforts to support this kind of investment have not yet resulted in success.

Measurement providers using STB and Smart TV ACR datasets also face important challenges managing the costs as well as processing the data that is made available to them. MVPDs control their own STB data, and the datasets differ in both content and structure across different MVPDs. Smart TV OEMs, who generally use different proprietary ACR technologies in their Smart TVs, each provide a unique variation of data structures and formats for measurement companies to process. While each measurement company might consider its data commingling acumen to be part of its “secret sauce”, the differing methodologies also mean that the same underlying data will not be used identically across measurement providers.

Furthermore, some MVPDs and TV OEMs do make their data available for measurement purposes, but others place stringent limits on how their data can be used, and yet others do not share data at all. Data licensing, in aggregate, could be very expensive for measurement vendors, presenting a significant cost challenge. As a result, measurement providers do not have access to full-footprint data from either STBs or from Smart TVs. This “Swiss cheese” effect means they must undertake complex modeling and projection exercises to produce estimates that represent the entire US.

<sup>2</sup> For more detail on the value of panels in TV measurement, please see the CIMM white paper [“WHO’S COUNTING? The future role and value of panels in US TV measurement”](#) by Steuer and Joan FitzGerald.

## 1. Market context: TV and measurement have evolved together

Furthermore (in part because each of their datasets have different patterns and because they do not include panel data), measurement methodologies employed by alternative measurement companies differ significantly from one another. This means that their measurement outputs differ from each other and from Nielsen's figures – and these differences and variations create uncertainties in end users, looking to decide whether or how to base their business decisions on these new datasets.

It's also important to note that the economic challenges facing new entrants in the currency marketplace are high. New providers must invest in building out their measurement solutions and working with a variety of partners for data, before they can begin generating revenues. Agencies, advertisers and publishers, facing their own commercial pressures, are generally unwilling to invest in new measurement solutions before seeing a high-quality, robust solution, and are often unwilling to significantly increase their measurement and data costs, while continuing to pay for the incumbent currency solution. Moreover, the costs of paying for the incumbent solution tend to be fixed, relative to the size of the customer's advertising business, and do not necessarily fall in line with reduced usage, creating economic disincentives that can make it hard for new currencies to establish themselves.

Despite these challenges, alternative measurement providers, with the help and access of these alternative data sets, have helped to unlock value for buyers and marketers – and will continue to do so by enabling different ways of trading – but confusion and uncertainty remain.

The US JIC's certification process for household measurement was in part an effort to address these concerns, increasing comfort with the new-available TV measurement datasets for use as TV currencies. However, concern and confusion as to the future of TV measurement and currency remains a concern across the US TV marketplace.

However, before exploring the role of the new US JIC, let's explore the roles that JICs have played in other markets.

## 2. What is a JIC Anyway?

### Origin Story: The First JIC

The first JIC originated in the UK in 1931 to standardize advertising metrics in the newspaper business.<sup>3</sup> Barb Audiences Ltd., the UK TV JIC, dates from 1978, and was originally formed to standardize measurement across the government-funded BBC and the ad-supported ITV. The UK government – specifically, the Secretary of State for the Home Department – approved the organizational approach and principles of the organization, which included:



Avoiding disparate audience claims.

---



A joint Board to arrange funding and management.

---



Meeting the full requirements of advertisers.

---



Establishing common data sources.

---



Not differing on matters open to more than one interpretation.

### Common JIC Purposes

Generally speaking, the primary purposes of a Joint Industry Committee can include some (or all) of the following:



**Setting Standards:** JICs develop and promote standard for TV audience measurement to ensure consistency, data quality, and transparency across the sector for buyers and sellers.



**Currency:** The audience metrics, datasets, and measurement provided by the JIC typically serve as the currency for trading advertising as a commodity.



**Insights:** JICs generally provide detailed data and reports into viewing audiences, their demographics and viewing behaviors across different channels and programs.



**Market Security and Confidence:** JICs take steps to increase trust and build confidence between buyers and sellers, in large part by supporting and arguing for measurement transparency throughout the ecosystem.

<sup>3</sup> Source: Jarvis & Grono, "JICs, Joint Industry Committees & MOCs, Media Owner Committees – Ten Cornerstones" (2023).

## 2. What is a JIC Anyway?

A JIC could also play an important role in fostering collaboration, driving innovation, and promoting responsible practices. JIC activities may also contribute to the development of a healthy and sustainable TV ecosystem by establishing guidelines, providing transparency, and addressing challenges in a collaborative manner.



*Many of us feel besieged by data and at risk of not seeing the wood for the trees. JICs were forged in the fire of consensus building and the collaborative effort that goes into them really pays off.*

- David Fletcher, Ex Chief Data Officer, Wavemaker UK<sup>4</sup>

JICs also tend to drive down the overall cost of measurement in a media ecosystem. A recent UK study calculated the overall annual cost of media measurement in the UK to be £60 million, representing just 0.27% of the total annual ad spend of £20 billion.<sup>5</sup> That ratio is a tiny fraction of the US equivalent, where measurement costs represent closer to 2% of total ad spend (or more, depending on how one calculates). While one could certainly argue that in some ways the US measurement ecosystem is more advanced or more innovative, it's hard to imagine a justification for the 8-10x cost differential on this basis alone. And as mentioned above, the current high measurement costs in the US also have made it very difficult for new entrants in the space to thrive, since their market entry requires net new measurement spend to support their launch phases.

Let's explore the different kinds of JICs operating in the global marketplace, to see if there is a version that might make sense for the US market today.

### Two Versions of JICs, MOCs, and Other Alternatives

As media markets have evolved in countries around the world, so have the industry bodies overseeing TV audience measurement in each market.

<sup>4</sup> As quoted in "Signals in the Noise," May 2023, presented by Brenda Beeftink, research director of the IPA (UK's rough equivalent of the 4As in the US), delivered at CIMM member meeting, 6/12/2024

<sup>5</sup> *ibid*



## 2. What is a JIC Anyway?

### *Exhibit: Taxonomy of JICs, MOCs and Other Industry Bodies*

I. Joint Industry Currency	II. Research Supplier Marketplace	III. Media Owner Committee	IV. Joint Industry Committee	V. Hybrid (Committee + Research Supplier)
<p>Single currency owned by media owners, media agencies &amp; advertisers</p> <ul style="list-style-type: none"> <li>Defined governance/structure (usually non-profit)</li> <li>Suppliers contracted to run service on provider's behalf</li> <li>Need for consensus creates risk of moving slowly</li> <li>Suppliers accountable to JIC</li> </ul>	<p>Research supplier(s) run independent service(s) without central coordination</p> <ul style="list-style-type: none"> <li>For-profit service provider[s] run(s) according to their priorities [which can both stifle and drive innovation]</li> <li>Limited accountability</li> <li>Often unaudited</li> </ul>	<p>Single measurement service owned by media owners / publishers</p> <ul style="list-style-type: none"> <li>One or more suppliers contracted to run service on committee's behalf</li> <li>Media owners define the service [which can influence level of innovation]</li> <li>Service can be biased towards media owners</li> <li>Suppliers more accountable to media owners than buyers</li> </ul>	<p>Media owners, media agencies &amp; advertisers coordinate, but do not own or control TAM service</p> <ul style="list-style-type: none"> <li>Generally limited to an advisory role</li> <li>Need clear definitions of JIC governance &amp; structure</li> <li>Need for consensus can create risk of moving slowly</li> <li>Hard to hold providers accountable</li> </ul>	<p>JIC is also a research company and runs at least some aspects of measurement / data services</p> <ul style="list-style-type: none"> <li>Non-profit (potential for profit subsidiary)</li> <li>Entity is controlled by media owners, media agencies &amp; advertisers</li> <li>Suppliers contracted to augment in-house capabilities</li> <li>Need for consensus creates risk of moving slowly</li> </ul>
e.g. UK, Italy	e.g. USA, Brazil, Mexico, Spain, South Korea	e.g. Germany, Australia	e.g. Mexico	e.g. Canada, France, Japan

Source: [PXI Review of Global TV Measurement Ecosystems, July 2023](#); adapted / extended based on [RSMB presentation "Modern JIC Measurement - The Building Blocks: A View from the UK"](#)

## 2. What is a JIC Anyway?

### I. Joint Industry Currency

Organizations like [Barb](#) in the UK and [Auditel](#) in Italy create standardized datasets used for TV measurement – in other words, Joint Industry Currencies. They are generally non-profit organizations, are governed by media owners, media agencies, and advertisers, and generate and bring measurement data to market for all ecosystem players via a public rate card based on the size and type of organization licensing the data. Measurement companies compete with each other on a periodic basis (e.g. every 5-6 years) to be the suppliers of various aspects of the JIC's data infrastructure, via a competitive tendering process, which typically covers establishment surveys, panel data, return-path data, modeling / data processing, and other key components of the service. However, the core measurement data is both governed and distributed directly by the JIC. Media buyers and sellers in theory remain free to transact on whatever data they prefer, but in practice the JIC-provided data serves as the primary common reference dataset for the covered areas of the media ecosystem.

This model emphasizes shared governance, transparency and standardization, creating a stable dataset based on input from media buyers and sellers. However, this non-partisan stability potentially comes at the expense of speed and agility in adapting to rapid changes in the media ecosystem, as significant changes to the underlying methodologies require broad consensus on methodology, potentially alongside new supplier contracts to provide different underlying data and/or services.

However, it's difficult to imagine the US market aligning around a single currency, given its fragmentation, competitive dynamics and the prevalence of trading on publisher-supplied data from the major online platforms. Moreover, many of the major players have committed to supporting a multi-currency marketplace rather than anointing and endorsing a single currency, alleviating concerns about anti-competitive behavior and cartelization. The Sherman Antitrust Act of 1890 prohibits cartels and other anti-competitive practices, such as price-fixing, bid-rigging, and market allocation. The Department of Justice's (DOJ) Antitrust Division prosecutes cartel activity as felonies and can impose heavy fines and prison sentences on individuals and corporations involved. Although anointing a single currency might not run afoul of these restrictions, it seems prudent to avoid attempts to create an organization whose mission is to instantiate a single TV currency. Thus, though this model is instructive, it's likely not suitable for the US marketplace.

### II. Research Supplier Marketplace

In many other countries, there is no single formal organization responsible for overseeing measurement or for bringing measurement data to market. The US, Mexico, Brazil, Spain, and South Korea all operate in this manner (though some markets do have bodies with advisory and/or auditing roles, such as the MRC in the US). Typically, one or more measurement providers provide measurement data to the industry.

The challenges resulting from a single dominant provider are many. The freedom to "let the marketplace decide" could, in theory, drive measurement innovation. However, in practice, once a single player gains sufficient control of the marketplace, it can exert contractual pressures that can stifle innovation, raising high barriers to entry for new competitors and slowing change in favor of maximizing profits.

In these countries, market entry by new measurement suppliers tends to be very challenging, with high costs and substantial revenue challenges, as many end users are understandably reluctant to increase their measurement spend to sustain a second player. Furthermore, there are also risks that measurement methodologies may be skewed in favor of the largest companies that pay the most money, generally the sell-side, potentially damaging overall industry confidence in the currency.

In global markets where multiple measurement providers compete, they often fragment along publisher lines, with different measurement providers becoming the media currency for categories of media provider, making it difficult for buyers to get a unified read on their overall media spend.

Although it is possible for competitive measurement providers to enter the market, doing so requires significant upfront investment in data and processing infrastructure, with no guarantee of being able to win paying customers, who are generally reluctant to invest without seeing the measurement datasets. Net-new measurement budgets are generally difficult to come by, since this investment comes straight out of the bottom line.

## 2. What is a JIC Anyway?

### III. MOC: Media Owner Committee

Audience measurement in countries including Germany and Australia is controlled by the media owners, who contract as a group with measurement companies to create and manage audience measurement data. Like Joint Industry Currencies, the data provided by MOCs is typically the single trading currency in that market. While this scenario potentially tilts the playing field in favor of the media companies, at least the incentive structure is transparent and similar for all media buyers. Innovation is typically driven – or limited – based solely on the needs of the media owners.

### IV. Joint Industry Committee

Another approach to managing some aspects of audience measurement is through a governing organization that stops short of “owning” the official media currency – a Joint Industry *Committee* rather than *Currency*. This approach generally involves a governing body in which media buyers and sellers work together to define standards for measurement and data but stop short of awarding contracts to specific vendors to provide a single implementation of those standards across the industry.

This approach is arguably far more compatible with a multi-currency marketplace and is also much less expensive and easier to implement and manage than an organization that is also responsible for creating, managing, and distributing the currency dataset(s).

However, since this form of JIC typically has no implementation capabilities, its role can become largely advisory – it can establish standards but may lack the ability to enforce them directly. Media buyers and sellers remain free, at least in theory, to use and trade on whatever measurement data they want, as long as buyers agree.

A non-currency-based JIC offers a forum in which buyers and sellers can try to reach consensus on how to best address their measurement needs – which can be a laborious and slow process, but this is true of most measurement improvements. Measurement companies are potentially left with the choice of either waiting for the JIC’s recommendations and standards to emerge before investing in new products, or of innovating new products that may ultimately not meet JIC standards.

The existing US JIC, which is arguably structured in this manner (and has tried to address this challenge by certifying existing marketplace currency vendors. Indeed, this kind of structure, providing guidance but mandating particular solutions, may be as much structure as the US marketplace is willing to accept.

### V. Hybrid: JIC and Research Supplier

A hybrid model has the potential to deliver the advantages of a joint industry currency – cooperation, standardization, confidence in the data – without anointing a single media currency or allowing a single dominant research supplier to functionally control the entire measurement industry. In this model, a JIC committee sets priorities and governs standards, and also owns and/or operates some aspects of the data and measurement ecosystem but stops short of mandating trading metrics and currencies – leaving those decisions to buyers and sellers to work out.

Canada’s [Numeris](#) is an example of this model: it is a nonprofit company, governed and managed by major participants in the media ecosystem, that also operates a measurement panel, aggregates consumption datasets – which are shared by most media publishers – into a common framework, and makes this data available in the marketplace.

Unlike a currency-based JIC (like BARB in the UK), Numeris does not lay claim to being the single trading currency in the marketplace; instead, it makes its data available on an equal basis to media buyers and sellers as well as to other data and measurement companies.

Such a model enables all players in the media ecosystem who are involved in the JIC to share both control of and access to a standardized set of data across many platforms and services – including, potentially, the creation of a high-quality measurement panel – while retaining the freedom to use that data as they like both within their own businesses and in the context of media transactions. Media buyers, sellers, and measurement companies can focus on using this baseline data – alone or in combination with their own proprietary datasets – to create measurement solutions that meet their specific business needs, maintaining a competitive and potentially innovative marketplace while constraining costs and enhancing confidence in data quality.

# 3. The US JIC - A Short History

The [US Joint Industry Committee](#) (“US JIC” in this paper) was formed in early 2023, under the auspices of the VAB and [OpenAP](#), a company founded in 2019 (and still owned) by a group of major TV publishers, including NBCUniversal, Paramount (then Viacom), Warner Bros. Discovery (then WarnerMedia), and Fox. OpenAP is (and remains) a commercial entity focused on accelerating and facilitating the adoption of advanced TV advertising in the US marketplace. As stated above, the US JIC has been largely successful in its stated goals of advancing the conversation to support the adoption of multiple currency datasets for US TV measurement and of making additional datasets available to the industry. However, certain aspects of the US JIC have not been widely publicized to date, so we’d like to provide a bit of depth on this organization that has done the industry a huge service.

## Institutional status

The US JIC is structured as a 501(c)(6) non-profit organization. While this is absolutely a verifiable form of a nonprofit organization in the US—one in which ownership equity does not exist in the traditional sense—this structure is fundamentally different from the “charitable organization” form of 501(c)(3) nonprofit familiar to most readers.

The main differences between a 501(c)(6) and a 501(c)(3) nonprofit lie in their purposes, activities, and tax benefits:

	501(c)(3): Charitable Organizations	501(c)(6): Trade Associations and Business Leagues
Purpose	Dedicated to charitable, religious, educational, scientific, or literary purposes.	Focused on promoting the interests of a particular industry, profession, or business group.
Tax-Exempt Donations	Contributions to 501(c)(3) organizations are tax-deductible for donors.	Tax-Exempt Donations: Contributions are not tax-deductible as charitable donations (though they may be deductible as business expenses in some cases).
Activities	Typically engage in activities that directly benefit the public, such as providing aid, education, or other charitable services.	Often engage in member-focused activities, including advocacy, networking, or industry promotion.
Lobbying/ Politics	Limited lobbying is allowed, but direct political campaigning or endorsing candidates is prohibited.	May engage in significant lobbying and advocacy, as long as it aligns with the organization’s purpose.

In summary, 501(c)(3) nonprofits serve the public good and donations are therefore tax-deductible, while 501(c)(6) organizations serve members’ shared business interests and contributions to the organization are not tax-deductible.

What does this mean? In simple terms, the US JIC is closer in funding model to the NFL (which is also a 501(c)(6)) than, say, Kars4Kids.

The official stated goal of the US JIC is “to address an unmet need in the TV advertising landscape by establishing a collaborative forum to facilitate discussion between buyers and sellers on the optimal requirements both parties agree are needed for transactional enablement as a currency, and then determining if measurement solutions meet those requirements.”<sup>6</sup> It is not providing or endorsing a single currency, but is looking to support a multicurrency future for cross-platform video advertising, while creating baseline requirements that aim to help emerging companies identify priorities for currency solutions to scale.

<sup>6</sup> From a US JIC memo provided to CIMM and the authors on November 28, 2024.

### 3. The US JIC - A Short History

#### Membership and operating model

As of June 2024, US JIC members include many participants from both the buy- and sell-sides.

**Exhibit: Participants in the US JIC (as of November 2024)<sup>7</sup>**

Sell-side Participants	Buy-side Participants	Association and Operational Management
<ul style="list-style-type: none"><li>• A+E Networks</li><li>• AMC Networks</li><li>• FOX</li><li>• Hallmark Media</li><li>• NBCUniversal</li><li>• Paramount</li><li>• Scripps</li><li>• TelevisaUnivision</li><li>• Warner Bros. Discovery</li><li>• Samsung Ads</li></ul>	<ul style="list-style-type: none"><li>• Dentsu</li><li>• GroupM</li><li>• Havas</li><li>• Horizon Media</li><li>• IPG Mediabrands</li><li>• Omnicom Media Group</li><li>• Publicis Media</li><li>• RPA</li><li>• Butler/Till</li></ul>	<ul style="list-style-type: none"><li>• OpenAP</li><li>• Chicago Association Management (CAM)</li><li>• Independent Consultants</li></ul>
		Trade Group Participant
		<ul style="list-style-type: none"><li>• VAB</li><li>• CIMM</li></ul>

Sources: [US JIC Website](#), [US JIC press release](#), [StreamTV Insider](#)

As stated by the JIC<sup>8</sup>, its current operating model is as follows:



**Board of Directors:** Responsible for review and approval of financial model, corporate governance and funding.



**Full Committee:** Composed of all member organizations with cross-disciplinary representation from Research, Ad Sales, Product and Data/Technology leadership.



**Subcommittees:** Subcommittees are the operating groups where the work is done on behalf of the US JIC. Buyers and sellers will have equal voice in decision making. To achieve this, the JIC strives for an equal number of representatives from the buy - and sell-side serving on the subcommittee.



**Working Groups:** Within the various Subcommittees, Working Groups are established to advise the Subcommittee where more niche expertise is needed.



**Third Party Management, Counsel, Advisors and Consultants:** The US JIC retained an outsourced association management vendor at the time of its formation to handle Governance, Finance, Tax and Membership Management. Independent antitrust and legal counsel is retained to further support the management of bylaws and governance, in addition to the employment of independent consultants with combined decades of buy side experience to support its ongoing initiatives.



**Coordination & Technology Service Provider:** OpenAP provides its technology for the use of Streaming Data Service, as well as operational and administrative support to execute the initiatives and decisions made within the Committee. However, OpenAP does not serve on the Board, nor does it have a vote in any Committee decisions.

<sup>7</sup> According to the US JIC, "Open invitations stand to additional publishers and streaming platforms including Disney, Amazon, Netflix, among others."

<sup>8</sup> From a US JIC memo provided to CIMM and the authors on November 28, 2024.

### 3. The US JIC - A Short History

#### Progress to date

The US JIC's initial actions were to establish a certification program and set about certifying multiple cross-platform currencies as capable of supporting data-driven investment in TV, to aggregate first-party streaming from the participating publishers and to provide it to certified measurement vendors, and to support planning and posting across multiple programmers. The US JIC invited select measurement companies to respond to a Request for Information to be considered for certification; six measurement companies responded to the RFI.

In September 2023, the US JIC announced it had granted conditional certification to Comscore and VideoAmp, arguably marking real progress in establishing a multi-currency marketplace for video advertising. Full certification for Comscore and VideoAmp for household-level viewership was then granted in early 2024, while iSpot.TV received household - as well as persons-level certification in August 2024.

The US JIC has also looked to establish a precedent for, as well as a technical mechanism by which, publisher first-party data can be shared in a privacy-protective manner. The Streaming Data Service (SDS), it is a multi-publisher environment where first-party digital delivery data can be accessed through a Federated Data Clean Room (FDCR) to drive strategic value and investment. This solution is used by the JIC to offer multi-publisher data access for use in deduplicated reporting. The data sharing and query management system was built using OpenAP as the technology service provider, leveraging their existing infrastructure. This forward-thinking approach to data privacy and integration across various partners may help shape a more collaborative data future for the entire TV industry.

The data sharing and query management system is built on top of Snowflake and allows for either single publisher queries or queries across a federation of publishers via the US JIC. This, in theory, can enable business-rule-governed access to data for both planning and measurement purposes. The technology that underpins the Streaming Data Service went live in September 2024, with several US JIC members active in integrating and testing the solution at the time of this report. The US JIC has said it intends to make SDS fully operational in 2025.

These initiatives are designed to increase competition, improve measurement accuracy for agencies and advertisers while streamlining operations, with the ultimate goal of creating an improved and functional multi-currency marketplace for streaming media measurement in the US.

#### A positive impact

In our view, the US JIC has had a significant positive impact in the US market, helping to drive industry momentum around a vital set of issues at a critical time. After years of conference-panel chatter about collaboration and cooperation in the US TV measurement marketplace, the US JIC has delivered real work and created positive momentum toward actual measurement collaboration and standardized datasets.

The US JIC has also helped to legitimize a multi-currency marketplace for video advertising. By evaluating and certifying new measurement companies like Comscore, iSpot, and VideoAmp, the JIC has fostered competition and innovation in the measurement of TV and streaming media, enabling more accurate and comprehensive audience measurement, and helping to build confidence for advertisers and networks alike.

It is also undoubtedly true that helping to create a functional hybrid TV measurement ecosystem, utilizing the first-party datasets of TV publishers, is a necessity, although fully leveraging this data is not without its complications. In addition to certification of currency providers, the US JIC has also established both a precedent for and a technical mechanism by which such data can be shared.

Having delivered so much, we believe the time is right for a positive debate about the future role of the US JIC. How can the JIC build and grow support across the wider industry? How should it be funded and operated? How can it help to build trust, confidence and transparency? How should it work with other organizations in the US marketplace?

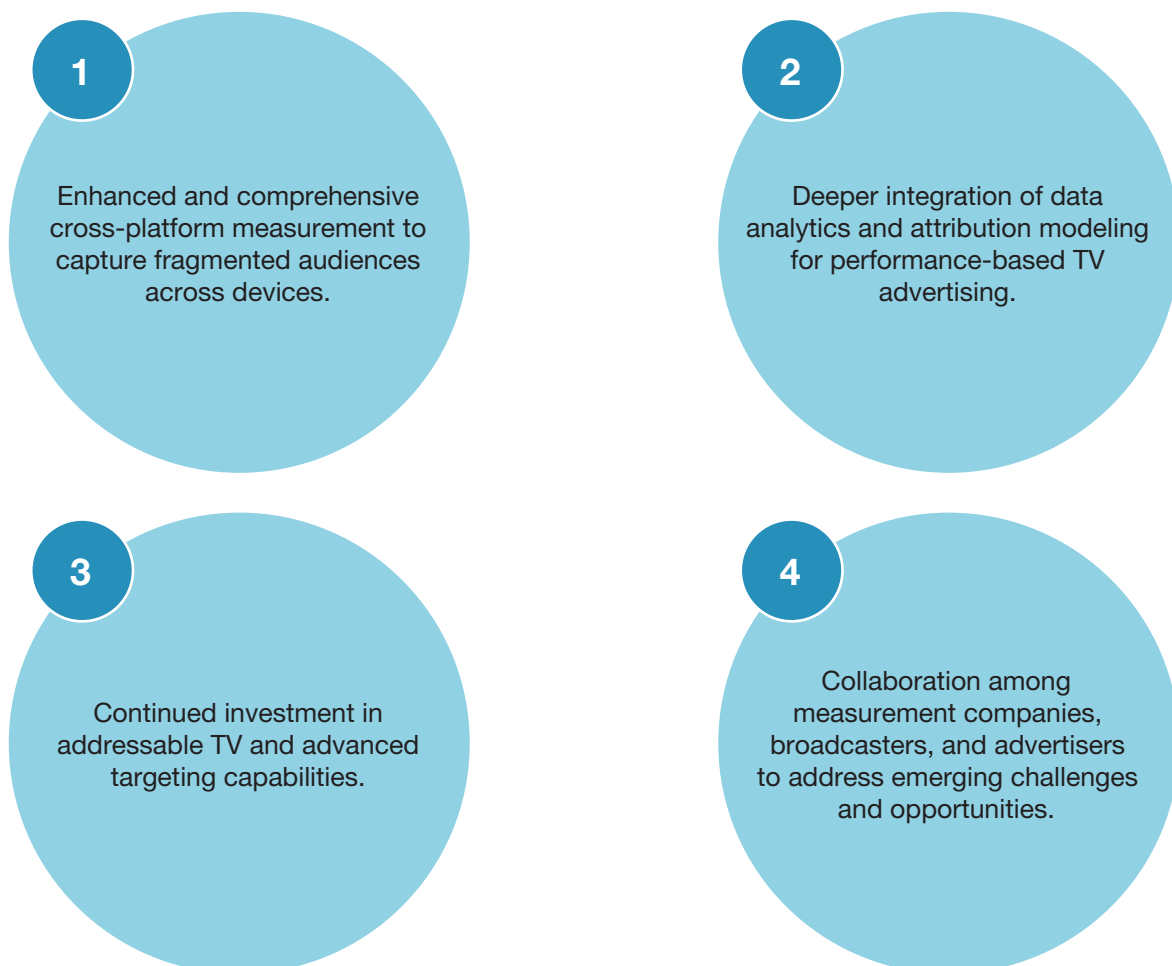


## 4. Why does the US Market Need a JIC?

As we have laid out, digital technologies have driven major changes in TV distribution and viewership over the last two decades. The global pandemic served as a catalyst to further accelerate innovation and adaptation within the television landscape. These changes, and the resulting impact on measurement requirements, are analogous to changing the jet engines on a plane mid-flight. Fragmentation of viewership and diverging measurement estimates have media buyers and sellers alike concerned and confused about ratings, investments and the future – they lack the ability to reliably forecast and measure some of the most important aspects of their costs and revenues in a comprehensive way. This has been especially challenging at a time of significant change and commercial challenges across the industry.

To address these challenges, the US TV measurement marketplace needs to embrace a diverse range of methodological innovations and new data sources, to provide advertisers, broadcasters, and content creators with comprehensive insights into audience engagement across the complex web of traditional and digital TV platforms.

Buyers and sellers are looking for:



Accelerating change has also fragmented the measurement marketplace, generating multiple currency providers whose business models are complicated by the instability of data costs and uncertainty over who is delivering the most effective numbers.



## 4. Why does the US Market Need a JIC?

We believe that the case for a multi-currency marketplace is well established, and that competition can deliver the diverse range of innovative measurement solutions that buyers and sellers are looking for, while ensuring competitive pricing.

We also believe that there's an opportunity to stabilize and support the growth and development of the multi-currency marketplace through a collaborative effort supported by buyers and sellers across the US market. However, there is no organization in the US currently empowered to own the development of comprehensive measurement standards in this area and that this is something that the US JIC can aspire to deliver.

Basic standards exist because, in many situations, differentiated products and/or solutions do not confer competitive advantage or enhance competition. Indeed, in many instances, multiple solutions are confusing and hamper valuable business progress. Automakers do not differentiate their automobiles by requiring them to run on proprietary (but not widely available) fuel blends. Appliance manufacturers do not make blenders or washing machines with nonstandard electrical plugs – nobody would buy them! Standard shoe sizes means one can mail order shoes and have a reasonable expectation they will fit. Betamax may have been a superior consumer videocassette format, but its eventual demise and the standardization on the single standard of VHS enabled massive growth in home video.<sup>9</sup>

Standards build confidence among all players in a business ecosystem, which in turn enables businesses to expand while still producing differentiated products.

Similarly, there are markets in which core infrastructure resources are better shared by the industry as a whole, rather than being maintained separately by each individual marketplace participant – for example, airports, roads, train tracks, long-distance electrical grid cables, and even EV charging infrastructure: US automakers are adopting Tesla's charging standards to better support the needs of their EV buyers and replace "range anxiety" with confidence that they will encounter standardized charging infrastructure along the way to reach any destination.

Sometimes standards and shared infrastructure evolve organically – because certain features help products win out (e.g. VHS, with 2-hour tapes, over Betamax, with only 90 minutes; Blu-ray over HD-DVD), because consumers and/or suppliers drive for changes (e.g. the RCS for mobile messaging – to stop the "blue vs. green text" battle), etc. – and sometimes they arise via of government intervention (e.g. the EU DMA anointing USB-C for charging). But both such evolutions take time – more time than the US TV marketplace can afford to wait, if recent business results are any guide.

JICs and other similar organizations exist exactly to help define and orchestrate better solutions, faster and (ideally) more equitably than waiting for the market to deliver without intervention, while also avoiding (or minimizing) the need for regulatory intervention or government involvement.

We believe it's time for a truly collaborative logic to be applied to the US media and measurement marketplaces – offering simpler solutions to some of the industry's most pressing challenges, while still preserving competition and the ability to innovate.

Collaboration through a JIC could offer a range of benefits, such as improving access to data, something that the US JIC is already prioritizing through its Streaming Data Service). Similarly, promoting consistency and standardization could also be hugely valuable.

Taken together, collaboration in these areas would help to make TV advertising as a whole easier to buy and measure, helping to maintain or even expand publisher revenues, while also streamlining media transactions, enhancing advertising efficiency for marketers, and reducing development costs for measurement companies – thereby maintaining a competitive measurement environment that can ultimately reduce measurement fees for both buyers and sellers.

The alternative to such collaboration – expanding complexity and fragmentation in media planning, buying and measurement – threatens the very existence of an independently measured US TV marketplace.

<sup>9</sup> Betamax offered better picture quality, but VHS offered 2-hour tape length (which accommodated more full-length movies, compared to Beta's 90 minutes) and was developed / licensed by a consortium (enabling multiple competing manufacturers, vs. Beta being Sony-only).

## 5. Barriers to Cooperation in the US Market

Before turning to set out our future vision for the US JIC, it's important to briefly explore whether there are significant obstacles to industry-wide cooperation in the US market. Some of these issues have served as real, perceived, or imagined obstacles to previous attempts to organize common frameworks to support the US media marketplace.

It will always be challenging to secure active participation from an extremely diverse and often competing group of industry participants with wildly different perspectives and business goals, especially if they are expected to engage in productive conversations and to make decisions that they can all agree to support. For better or worse, the US market thrives on its competitive nature. This reality alone makes the idea of broad cooperation challenging.

Clearly, any future industry collaboration will need to adhere to a range of industry-wide regulations and requirements, such as respecting relevant privacy laws and regulations, and complying with industry-specific regulations such as those related to advertising, consumer protection, or industry codes of conduct. It will also need to ensure that it has established clear processes and procedures for managing intellectual property rights, internally and externally.

Beyond this, we would argue that a JIC needs to maintain the highest possible standards in transparency and fairness, to build trust and confidence. It should establish clear governance structures and formalize its operations through clearly written and transparent agreements between participating companies. These contracts should outline the purpose, scope, membership criteria, decision-making processes, and dispute resolution mechanisms of the JIC. It should also maintain transparency in its operations, particularly regarding financial matters and decision-making processes. Regular reporting to members and to the wider industry will be vital, helping to allay concerns about collusion or price-fixing.

It is worth noting that some of these requirements are already being addressed. Our aim here is simply to assert their importance.

In addition to these general concerns, the US market also presents some unique challenges to industry-wide collaborations, like Joint Industry Committees. The first is antitrust compliance. US antitrust laws (e.g., the Sherman and Clayton Acts) prohibit collaborations that unfairly restrict trade or reduce competition. A JIC will have to ensure that its activities steer clear of these concerns, helping to promote rather than stifle competition and innovation.

For example, if the JIC is to be involved in setting industry standards, it must be acutely aware of the needs of companies throughout the ecosystem and be cautious not to create barriers to entry or to exclude competitors unfairly. Standards-setting activities must be transparent, inclusive, and based on legitimate industry needs.

These legal and operational realities are significant, but we do not believe they are insurmountable for a JIC whose core purpose is to promote competition and to support the development and stability of a multi-currency marketplace.

Although legal advice will clearly be required, we believe that transparent governance and open membership can help to ensure compliance.

# 6. A Future Mission and Role for the US JIC

Before describing our future vision for the US JIC, we need to address the nomenclature underpinning this discussion. In our experience, the word “JIC” is semantically loaded with meanings and expectations that complicate discussions and make it harder to reach agreement about the roles and responsibilities that any new organization could play. Put simply, any new entity in the US marketplace will not resemble Barb, Médiamétrie, the AGF, or any of the well-established organizations operating in other markets. For the purposes of this paper, we’d like to sidestep unhelpful discussions about whether or not the proposed organization is or isn’t a true JIC.

The US industry already has numerous associations, agencies, trade bodies and industry organizations with a stake in the process and with incredibly valuable assets to contribute to a broader effort. However, none of these existing bodies or institutions is currently structured, positioned, resourced or, indeed, authorized and empowered to assume all the desired responsibilities that we believe a JIC can and should play in the US market.

Our suggested future vision begins with the existing US JIC, expanded and enhanced to deliver on the ambitious mission we set out below. The point of the exercise is a thought experiment-or maybe a proposal-for what we believe should be.

The US marketplace is competitive and market-driven and transitioning into a multi-currency ecosystem, with various currency providers and numerous media companies already using their own data for targeting and measurement: MVPDs, vMVPDs, TV OEMs, streaming services, YouTube, and many more.

In this marketplace, the JIC could help to facilitate and enable, rather than providing its own currency, serving as a connective tissue that allows the market to access information and innovate. To succeed, the JIC must standardize language, data collection methods, and underlying data structures, with a goal of enabling competitive measurement companies to create consistent, comparable measurement solutions that help to build confidence and trust.

By delivering common frameworks and shared taxonomy, the JIC could also help to improve the economics of TV measurement, lowering barriers to entry and supporting innovation and competition.

## A JIC’s potential mission and role in the US market

What role might a JIC seek to play, given the particular circumstances of the US marketplace and the range of institutions and regulatory frameworks already in place?

We propose that the JIC’s future mission should be to support and facilitate the effective operation of the multi-currency marketplace, promoting confidence and effective competition by:

1

Identifying and standardizing the foundational concepts, processes, and nomenclature for the TV measurement ecosystem and multi-currency marketplace.

2

Establishing a standardized data architecture that can support multiple stakeholders and a variety of use cases, reducing redundancy and lowering the costs associated with data processing and infrastructure development.

## 6. A Future Mission and Role for the US JIC

To deliver on this mission, we propose that the JIC should invest in the development of some or all of the following shared assets, standards and common practices:

1

**Common Universe Definitions – an Establishment Survey:** Providing a single standard set of definitions of the various universe definitions and estimates used for measurement would significantly enhance the comparability of different measurement providers' products. To achieve this, the JIC might take over operation of the existing ARF DASH study.

2

**Common Data Standards:** Each type of return-path data – STB, Smart TV ACR, streaming, etc. – differs in terms of data structure, accuracy/precision, metadata, and other features. Furthermore, within each category, data from different providers is not directly comparable or easily combined. Combining / commingling data from these various sources thus becomes a complex process, filled with assumptions and errors that mean even measurement providers who have access to the same data sources come up with different measures of the same activities. A standardized framework for such data would facilitate the combination of datasets, enhance accuracy of (and therefore confidence in) the data, and vastly reduce cost. Data suppliers might adapt their data collection methods to help with standardization; the organization could pick up where they leave off to process data into a comparable format.

3

**A Secure Federated Data Enclave:** Building on the notion of common data standards and formats, as well as on the US JIC's Streaming Data Service, The JIC could specify a privacy-compliant, business-rule governed, federated data enclave in which TV OEMs, MVPDs, streaming publishers, digital platforms, and other providers' data would be stored in a standardized format and made accessible to others – measurement companies, marketers, other publishers, etc. – through a common set of APIs and under a transparent set of rules. This structure could vastly streamline access to data by removing most of the logistical and privacy hurdles companies experience today and enabling them instead to focus on business governance.

4

**Privacy and Security Practices:** The JIC could be accountable for the oversight and deployment of data encryption methods that would be implemented to protect consumer information and publisher data both in transit and at rest. This includes using advanced encryption standards and protocols to prevent unauthorized access and breaches. Furthermore, comprehensive privacy policies would be established in alignment with US state regulations such California Consumer Privacy Act (CCPA) and others, ensuring that data collection, processing, and storage practices are transparent and consent-based. Furthermore, regular security audits and compliance checks can be leveraged to identify vulnerabilities and ensure ongoing adherence to legal and ethical standards. Collaboration with legal and compliance experts would be used to navigate the complex regulatory landscape and adapt to emerging data protection laws.

5

**A Common Identity Framework(s):** The JIC could oversee the evaluation of identity solutions through a structured and multi-faceted approach, initially by establishing clear standards and guidelines, as well as by developing a comprehensive and transparent evaluation criterion that could result in an identity certification program. Inclusive of the life cycle of the process would be regular audits and assessments as well as collaboration with other industry consortiums and key technology partners.

## 6. A Future Mission and Role for the US JIC

6

**Comprehensive Data and Metadata Standards:** the JIC could provide oversight and be accountable for the management of comprehensive data and meta data standards. Such a structured approach would likely include standardized formats and methods for STB and Smart TV ACR data (e.g. dwell time, edit rules, etc.) as well as universal IDs for both content and advertising, which could be deployed via watermarks and in databases accessible to members. It could use cloud-based solutions and integrate the privacy technologies required to safely secure the integrity of the data. Once again, regular audits would be leveraged to ensure the quality and security of the data. Due to the sensitive nature of this responsibility, the JIC would also likely look to employ a 3rd party oversight committee and would be fully transparent with the operations of this function. Additionally, the JIC would regularly publish reports on data usage and compliance by partners and customers as well as work closely with other parties to ensure standards are in line with modern data points and storage architecture.

This is clearly an ambitious vision and set of proposals for the industry – and we fully recognize that delivering in full on these proposals may be challenging, if not impossible. Our goal is to stimulate a debate, about the role that the JIC could play in the unique circumstances of the US marketplace and about the adequacy of the existing institutions and bodies that currently oversee the marketplace. If these are useful interventions, what can and should the industry do to deliver against them? What would need to happen to make them happen?

# 7. A Future Operating Model for the US JIC

Given the ambitious future mission we've set out above, how might the US JIC's membership, operations and funding be expanded to ensure successful delivery? We've set out a series of thoughts below, as a catalyst for future debate and discussion.

## Guiding principles

The new organization should abide by a series of important principles that are common to many comparable industry organizations around the world:<sup>10</sup>

- 

**A committee, not a currency:** The organization's mission is to provide standardized methodologies, tools, and datasets to support the entire US TV / video media ecosystem – including media buying planning, delivery, and measurement as well as content production, marketing and distribution. Given that multiple media currencies already exist in the US TV ecosystem, it seems unwise for the organization to play kingmaker. Rather than certifying specific vendors' datasets as "currencies," the organization will instead provide common, vetted, widely available, standardized currency-grade underlying datasets that multiple measurement providers can use to enable and support whatever metrics buyers and sellers choose to use to plan, buy, measure, and transact media.<sup>11</sup>
- 

**A neutral, non-partisan, independent non-profit:** The JIC will be a non-partisan, non-profit, independent organization, not beholden to any existing industry organization, business, or industry sector.
- 

**Fully transparent:** The organization will be fully transparent regarding governance, operations, finance, and methodology.
- 

**Voting members = media stakeholders:** The organization will have a tripartite governing board and voting membership: media owners, advertisers, agencies.
- 

**Committee-based specializations:** The organization will implement a committee-based functional operation structure. Specialized groups of experts will manage organizational functions.
- 

**Professionally and independently managed:** The organization will be managed by a small, independent, conflict-free team of industry experts and staff who are full-time employees. Staff will provide professional guidance and drive consensus among members but will not have voting roles.

<sup>10</sup> See *JICs, Joint Industry Committees & MOCs, Media Owner Committees – Ten Cornerstones* by Tony Jarvis and John Grono (March 2024), available online at: <https://researchworld.com/uploads/attachments/clu44wda70faokvtdk0jlfclh-a-media-measurement-white-paper-jics-joint-industry-committees-and-mocs-media-owner-committees.pdf>

<sup>11</sup> Note that auditing of compliance with standards could / should be left to the MRC.

## 7. A Future Operating Model for the US JIC

7

**Standards-based:** The organization will work with existing industry standards when appropriate ones are available and will create its own standards and specifications when no agreed standards exist.

8

**Operationally independent:** The organization will operate independently. External vendors, if needed for implementation, will be hired by open, transparent RFP processes and will be contracted for limited terms without guaranteed renewals.

9

**Funded by dues and commercial operations:** The organization will be funded by a combination of membership dues (for both voting and non-voting members) as well as data and platform usage fees. Rate cards will be public, standardized for each company type and, where applicable, will be tiered based on organizational size. Initial bootstrap funding will be required for startup; ongoing operations should be financially self-sustaining.

10

**Non-voting / industry affiliate membership:** Companies other than media owners, buyers, and agencies – including research and measurement companies, technology providers, data companies, etc. – can join the organization as affiliates and have an observer / advisory role in organizational committees but should not have a voting role.

### Participation

The utility of a collaborative organization depends on participation, trust and transparency. Without the right participants involved in shaping the organization, the JIC risks being either unrepresentative or unsuccessful, failing to win the support of the wider industry. Of particular importance is ensuring that the standards, processes and tools that are created reflect not just the needs and desires of a few large enterprises but are developed to support the needs of the many and to maintain an open, competitive marketplace. The views and needs of companies large and small, buy-side and sell-side, are important.

The key to success is to convince companies across the ecosystem that measurement is not a zero-sum game, but rather that there is value to be unlocked by creating common standards as a foundation for competition, innovation, comparability and trust. Equally, the JIC should assume that TV is a growing medium and that attracting new advertisers is critical for TV's future.

It also needs to be non-partisan, with a robust governance model and a commitment to transparency.

The JIC's success will depend in large part upon its ability to motivate and engage with companies across the entire TV and video ecosystem, large and small. New companies often drive innovation and push the industry to evolve, helping to ensure that its solutions meet both current and future needs. Niche publishers often service small but important audiences and have unique measurement needs.

The same realities apply to the marketing community, and it will be imperative to include the voices of smaller and mid-tier marketers, who often have different KPIs than the Fortune 500 giants. Accordingly, it is critical that the JIC includes a broad range of players in both its governance and membership structures, and that it also provides tiered membership and licensing fees to accommodate participants based, in part, on their financial resources.

So, how should the JIC think about maximizing participation across the ecosystem and building confidence in its role and activities? As a catalyst for discussion, we have developed an initial, illustrative analysis of participation across a range of industry segments.



## 7. A Future Operating Model for the US JIC

**Exhibit: Potential JIC Participants by Stakeholder Category**

Categories	For example:	Key Participant?	Voting Member?	Motivations?	Potential Concerns About / Obstacles
Marketers	P&G, T-Mobile, GM, Gap, Pelton, Walmart	Yes	Yes	Ultimately all advertising spend is their money; they need a seat at the table. Marketers need to hold other ecosystem participants accountable and push them to participate in the JIC and its standards or risk losing spend.	Have historically been unwilling to apply strong pressure to other ecosystem players by withholding spend from publishers who don't play nicely in data sharing / objective measurement.
Agencies	Holdcos (e.g. OMG, WPP)  Independents (e.g. Horizon, PMG)	Yes	Yes	Aggregate large amounts of media spend. Represent a huge variety of different client interests. Develop / select / combine tremendous	Arguably benefit from market complexity, and there are potential conflicts between agencies and their clients, which need to be counterbalanced by also including marketers themselves.
Traditional TV Publishers	Paramount, NBCU, Disney, Scripps, Nexstar, Televisa Univision	Yes	Yes	Primary funders, producers, and distributors of TV content. Major source of ad inventory. All operate at least some streaming infrastructure that generates data.	Some have historically been unwilling to share critical data.
Streamers / FASTs / VMVPDs	Netflix, Amazon, Fubo, AppleTV, Philo, etc.	Yes	Yes	Growing audience, at expense of traditional TV players. Aggressively moving into ad-supported space and would benefit from better measurement.	Have traditionally been unwilling to share data. Potential VPPA concerns that would have to be addressed in data infrastructure.
MVPDs	Comcast, Spectrum, Charter, Dish, Frontier, RCN/ Astound	Yes	Yes	Provide TV service to ~50% of US homes. Collect STB data. Many are also Internet providers and have unique data. Sell both broadcast and addressable advertising. Operate streaming services in addition to cable/satellite/OTA.	Have traditionally been unwilling to share data. Potential VPPA concerns that would have to be addressed in data infrastructure.

## 7. A Future Operating Model for the US JIC

Categories	For example:	Key Participant?	Voting Member?	Motivations?	Potential Concerns About / Obstacles
TV OEMs	Vizio, LG, Samsung, Roku	Yes	Yes	ACR data critical for measurement. Active and growing sellers of addressable advertising.	Some historically have not been willing to share data.
Digital Platforms	Google, Meta, TikTok, Snap	Yes	Yes	Huge customer reach. Huge levels of investment from marketers. No meaningful way to measure aggregate reach and frequency without their participation.	Walled gardens; unaccustomed to sharing any data unless forced. Some are so large that they believe they don't need to play nicely with others.
Measurement Companies	Nielsen, VideoAmp, iSpot, Relo Metrics	Yes	No	Should be clients / customers of the JIC, not voting participants. However, they should be engaged in an advisory / non-voting capacity to make sure standardized solutions are compatible with their needs. Standardization of data gives them the opportunity to showcase actual "secret sauce" by enabling new business capabilities.	Failure to include all players would invite charges of favoritism. Competitive issues (e.g. Nielsen's existing panel; others MVPD data agreements).
AdTech Activation Companies	The Trade Desk, Magnite, Mediaocean, FreeWheel	Yes	No	Should be clients and customers of the JIC with no voting participation. These kinds of technologies play a vital role in the landscape and should be accountable for meeting standards and transparency requirements as they move further into the measurement landscape.	Only a few main players play an outsized role in these potential transactions and could afford to pay. This might result in limiting competition.

## 7. A Future Operating Model for the US JIC

Categories	For example:	Key Participant?	Voting Member?	Motivations?	Potential Concerns About / Obstacles
Data / Identity Providers	LiveRamp, Experian, TransUnion, Verisk	Yes	No	Identity solutions would be suppliers to the JIC and are a necessary component to support a modern measurement infrastructure.	These companies all carry inherent flaws which requires the use of several partners to validate confidence. These costs are not immaterial to the JIC.
Media Inventory Aggregators	Cadent, Ampersand, Simulmedia, Roku	Yes	No	Should be both members and clients of the JIC. Should not have board representation (though Roku might be an outlier) but should be members who are welcome to participate in committees and have a voice.	Aggregators are participants in the TV landscape and failure to include companies of this nature would result in enabling and potentially inviting transactions that don't meet industry standards and could be harmful to advertisers.
Media Infrastructure Companies	AWS, Google Cloud, Adobe	No	No	While these companies are vital to support the infrastructure of the TV landscape, they have zero role in measurement or standard setting.	Many of these companies play multi-faceted roles in the ecosystem, as advertisers, as activation platforms, and as data suppliers. Who gets to have a seat at the table from those orgs has the potential to have outsized influence on a number of matters.

We would expect some of the participating industry stakeholders, notably smaller companies or organizations, to be represented by designated representatives or industry trade organizations - for example, the ANA or the 4A's. However, it may also be desirable to have direct marketer participation, especially from larger marketers. Size matters and money talks.

We've developed an illustrative analysis of potential participation below, identifying 130 members from across the ecosystem.

## 7. A Future Operating Model for the US JIC

### *Exhibit: Potential JIC Membership*

Entity Type	Examples	Projected Number
Marketers	P&G, Pepsi, Unilever, Nissan	20
Large Agency Holding Companies	Omnicom, WPP, Publicis, IPG, Dentsu	6
Small / Independent Agencies	RPA, Horizon Media, Canvas Worldwide	20
Large National Media Publishers	NBCU, Disney, WBD, Paramount, Fox, Univision	6
Small National Media Publishers	AMC, AETN	6
Local TV Network Groups	Allen Media, Hearst, Scripps, Sinclair, Tegna	6
MVPDs	Comcast, Spectrum, DirecTV, Dish, Cox, Frontier	8
TV OEMs / OS Providers	Samsung, LG, Vizio, Samba TV, TiVo	5
Digital Platforms	Google, Meta, TikTok, X, Reddit	8
Other Content Providers	Condé Nast, Dotdash Meredith	10
AdTech Activation Companies	Magnite, Trade Desk, Madhiva, MediaOcean	20
Data/Identity Providers	LiveRamp, Experian, TransUnion, Verisk	15
Media Inventory Aggregators	Cadent, Ampersand, Simulmedia, Roku	5
Media Infrastructure Companies	AWS, Google Cloud, Adobe	5

### Organization: structure, governance and management

As noted above, the JIC needs to be funded and governed by a combination of media owners, marketers, and agencies. The JIC's success will depend at least in part on support from the buy - and sell-sides of the media ecosystem, with a shared, balanced involvement in governing the new organization. This means creating a board and voting structure that ensures transparent decision-making, involving the various sectors of the ecosystem, combined with an inclusive membership that welcomes organizations of all shapes and sizes.

### Executive Committee

The JIC will be overseen by an Executive Committee (EC), with representation from across the membership base, that serves as both a formal management entity and as a conduit to the broader member body. The Executive Committee will serve as the formal governance structure of the non-profit entity, will establish and maintain strategic direction, and will serve as a sounding board for senior staff and for a more focused set of committees where more detailed work is done.

## 7. A Future Operating Model for the US JIC

The EC will operate in accordance with clear rules and procedures:

### Primary EC responsibilities:



Hiring / firing of the JIC's President or CEO.



Definition of overarching strategy and approval of major changes in strategy and organizational structure.



Approval of revenue sources and processes and allocation of budgets.

### EC terms and term limits:



EC members will be elected to serve 2-year terms by all of the JIC's voting members, each with a single vote.



No single person can serve for a period of longer than 2 consecutive terms. This ensures a variety of voices can participate with fresh and diverse ideas, while still maintaining sufficient continuity of expertise.



EC terms will be staggered such that only a fraction of seats will be up for election in any given year.



Company participation: Any member company from the following subset of participants can have a seat on the board):

Buy Side:	Sell Side:
• <b>Marketers</b>	• <b>Large national media publishers</b>
• <b>Large agency holding companies</b>	• <b>Local TV stations/groups</b>
• <b>Small and Independent Agencies (SIA)</b>	• <b>Digital platforms</b>
	• <b>MVPDs</b>
	• <b>Multicultural networks</b>
	• <b>TV OEMs / Stand-alone streamers</b>



Industry organizations: Existing industry organizations such as the 4As, ANA, IAB, VAB, MRC, etc., can appoint representatives for observer seats on the EC; however, these representatives will not vote (since each organization's membership is represented directly).



Voting structure: Since the organization is designed to achieve consensus, a supermajority of votes – certainly more than 60% and perhaps as high as 80% – will be required for major decisions.

## 7. A Future Operating Model for the US JIC

The buy side must have a strong voice on the Executive Committee. Marketers should control six seats; agency holding companies, and small / independent agencies should have three votes each. That gives us a total of 12 votes from buy-side member companies. Twelve additional seats will be distributed among sell-side members, distributed equally among large national media publishers, local TV station groups, digital platforms, MVPDs, multicultural content distributors, and standalone streamers/TV OEMs.

Term and company membership limitations should ensure that not only the biggest players can drive the agenda. These rules are meant to give smaller and mid-tier businesses an equal footing on the Executive Committee.

### ***Exhibit: Proposed JIC Executive Committee Structure and Membership***

Executive Committee (2-year, nominated)	24	
<b>Company</b>	<b>Number of EC seats</b>	<b>Potential Examples</b>
<i>Buy-side</i>		
Marketers	6	General Motors, Progressive, Wendy's
Large agency holding companies	3	Omnicom, Publicis, Group M
Small / independent agencies	3	Canvas Worldwide, W&K, Horizon
<i>Sell-side</i>		
Large national media publishers	2	Paramount, NBC, WBD, Disney
Local TV station groups	2	Sinclair, Nexstar, Tegna
Digital Platforms	2	Google, Meta, X, TikTok
MVPDs	2	Comcast, Charter, DirecTV
Multicultural networks / groups	2	AMG, TelevisaUnivision,
Standalone streamer / TV OEM	2	Amazon Prime, Fubo, AppleTV, LG, Roku

## Functions and committees

For optimal decision-making and implementation efficiency, the JIC will operate a series of specialized working committees, each with responsibility for planning, budgeting, and implementing different components of the JIC's solution set.

## 7. A Future Operating Model for the US JIC

The initial set of committees and their functions would include six committees:

- 1 Establishment Survey Committee:** Take over the operation of an official establishment survey and set of universe projections (i.e. the ARF's DASH).
- 2 Linear and Streaming Data Committee:** Create common standards for a common census-level repository structure for streaming, STB and Smart TV ACR delivery data.
- 3 Identity Committee:** Provide, assess, and/or certify identity solutions to enable standardized mechanisms for connecting various datasets in a predictable and consistent manner.
- 4 Security and Privacy Committee:** Develop and assist with deployment of a security and privacy model to both enhance consumer privacy and ensure data owners' compliance with relevant rules and regulations.
- 5 Training Academy Committee:** Develop materials / curricula / training programs to support industry education to facilitate bringing products / services from other committees to market.

Each committee would have at minimum, two members from the buy side and two from the sell side, as well as one member of the JIC's permanent staff to serve as liaison, manager and, occasionally, tie breaker. In addition, representatives of technology and measurement companies will be included as appropriate, though they will not have voting rights for committee decisions.

Committees can work through the Executive Committee for quarterly or annual approvals of their respective strategic plans, as well as budgets, and should provide regular status reports to the Executive committee and to the industry as a whole.

### A Member-funded Organization

As is currently the case with the existing US JIC, the re-imagined version will be funded primarily by member dues. There may be ancillary potential revenue streams in its future; the goal is for it to become a financially self-supporting entity (meaning no additional calls for member funding beyond regular membership dues). Members could be encouraged to pay dues for the first couple of years up front, in order for the organization to ramp up its efforts as the membership base expands. Could achieve long-term financial stability through a combination of some (or all) of the following revenue streams:

- Membership fees from both voting members and associate members, tiered based on member company size and industry sector.
- Certification fees.



## 7. A Future Operating Model for the US JIC



Fees from training, education programs and conferences.

We have developed an illustrative financial model based on assigning member fees to three tiers of member, drawing on the participation analysis above, with the following assumptions:



Any company, industry organization, or other entity is welcome as a member of the organization, but voting rights are limited to the core entity types listed in Table 5.



Membership dues at all levels are tiered based on company size, with revenue as a potential verifiable proxy.



As core ecosystem participants, voting members (as listed in Table 5) are expected to make a more significant investment than other member types.

### ***Exhibit: Potential Annual Membership Fee Structure (\$000s)***

#### **Voting Member Fees**

Paid by all voting members (media buyers and sellers), based on total company revenue

Small Entity	\$25	25	\$625
Medium Entity	\$50	40	\$2,000
Large Entity	\$100	20	\$2,000

#### **Associate Member Fees**

Paid by all associate members (adtech, measurement, aggregators, etc.) based on total company revenue

Small Entity	\$10	15	\$150
Medium Entity	\$25	15	\$375
Large Entity	\$50	15	\$750

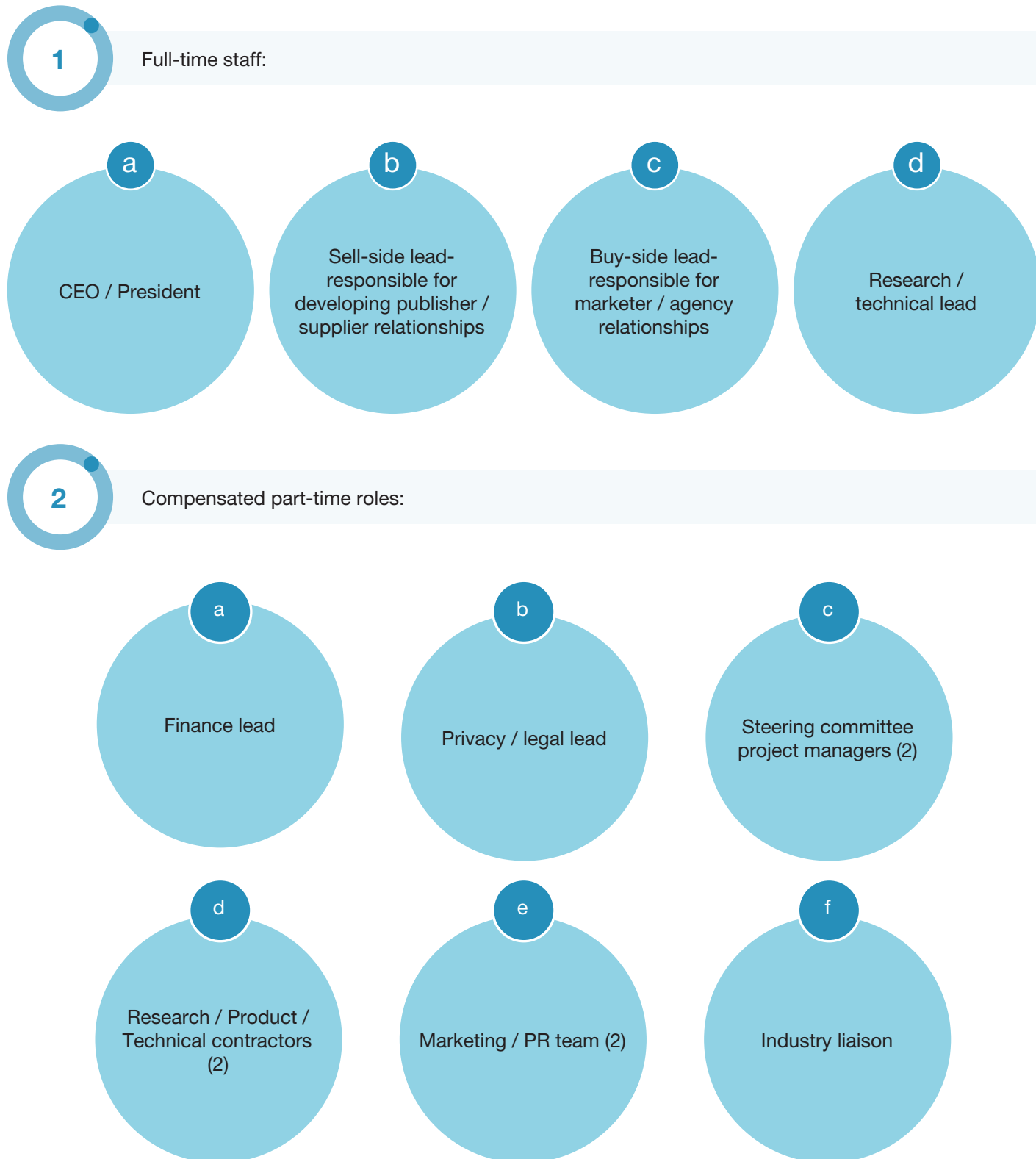
#### **Total Membership Fee Revenue**

**\$5,900**

## 7. A Future Operating Model for the US JIC

### Operating costs: an illustrative analysis

Initial operating cost estimates are based on the following staffing model:



Other estimated costs include office space, data hosting, and event production.

## 7. A Future Operating Model for the US JIC

**Exhibit: Estimated Revenue & Expense (run-rate) (\$000s)**

Total Revenue	
Membership Fee Revenue	\$5,900
<b>Total Revenue</b>	<b>\$5,900</b>
Expense	
Executive / Operational (non-technical) Staff (3 FT, 7 PT contract)	-\$3,275
Research / Product / Engineering Staff (1 FT, 2 PT contract)	-\$1000
Office Overhead	-\$300
Data Hosting / Processing	-\$50
Event Production	-\$400
<b>Total Expense</b>	<b>-\$5,025</b>
<b>Projected Net Annual Income</b>	<b>\$875</b>

### Partnering with existing organizations

To work effectively in collaboration with other trade organizations in the industry, the JIC could follow a strategic approach focused on fostering partnerships, sharing resources, and aligning objectives.

Alignment with the VAB, IAB, CIMM, MRC, ANA:

- 1 Identify common goals and know your role:** Begin by identifying common goals and objectives shared between the JIC and other trade organizations in the industry. Establish clear and concise expectations of responsibilities and commitments (RACI).
- 2 Establish communication channels:** Foster open communication channels between the JIC and other trade organizations. Regular meetings, workshops, and collaborative sessions can facilitate information sharing, brainstorming, and alignment of strategies.
- 3 Coordinate advocacy efforts:** Coordinate advocacy efforts on legislative and regulatory issues impacting the media and television industry. By speaking with a unified voice can amplify influence and drive positive change.
- 4 Collaborate on research and insights:** Pool resources and expertise to conduct joint research studies, market analyses, and industry surveys. Sharing insights and data can provide a comprehensive understanding of industry trends and challenges that will keep the JIC proactive and not reactive.

## 7. A Future Operating Model for the US JIC

### Relationship and respective roles of the JIC and the MRC

Collaboration between the JIC and the MRC should involve ensuring the accuracy, transparency, and accountability of Video audience measurement data. One needs to be the yin to the other's yang. Each has a potentially vital role to play in shaping how the industry can effectively evolve and scale to meet the needs of a consistently morphing marketplace. The re-imagined JIC can be a forum to facilitate and enable the media ecosystem by driving data and measurement standards. The MRC's historical role has been on ensuring that the systems, processes, and real-world implementations of measurement are as intended and agreed. The specific roles for the JIC and the MRC will need to be addressed by the industry during the process of adapting the JIC to its new form. Is there a discussion to be had about a combined entity? There is certainly a case to be made.

### Relationships and respective role of the JIC and Measurement companies

Some industry participants have raised concerns that the establishment of a strong JIC could stifle or impede competition. We hope we have provided enough thoughtful consideration to allay that argument. As we consider how our vision of the JIC might engage with measurement companies, the current US JIC serves as a baseline upon which to build. The re-imagined JIC can serve as a source of direction, can provide access to shared resources and knowledge and will deliver a comprehensive set of resources and standards for measurement companies, and can drive innovation and competition by lighting a runway for future companies to follow.

### Getting started

How do we kick off the process of bringing this new vision to life?

The first step is acknowledging that we have a problem with TV and video measurement in the US marketplace that is not going to solve itself, accepting that no measurement provider or existing industry organization is likely to solve these challenges alone, and recognizing that a JIC is the right way forward.

Assuming that the industry is agreed that there is a strong and practical case for a re-imagined JIC for the US market, the main next steps would be:



## 7. A Future Operating Model for the US JIC

4

**Hire interim core staff:** With an interim Executive Committee in place, initial staff can be hired. (likely to fixed, short terms) Critical initial roles include:

a

CEO / President

b

Sell-side lead-  
responsible for  
developing publisher /  
supplier relationships

c

Buy-side lead  
- responsible for  
marketer / agency  
relationships

d

Research /  
technical lead

5

**Develop initial membership roster:** Perform outreach to get initial commitments from members across the ecosystem to join and fund the organization.

6

**Elect permanent executive committee:** Once a core group of members have committed to the organization, the Executive Committee can be chosen. As we've discussed, we believe that the EC positions should have relatively short terms (2 or 3 years) with a maximum of 2 terms per human in order to provide opportunities for companies across the ecosystem to be represented.

7

**Create operating committees:** The bulk of organizational work will be done in the operating committees, which we believe should be established and begin operations in more or less this order:

a

Linear /  
Streaming Data  
Committee

b

Data Standards  
Committee

c

Identity  
Committee

d

Security  
and Privacy  
Committee

e

Training  
Academy  
Committee (can  
potentially wait)

### OK, let's go!

There is no doubt that what we're proposing is ambitious. We know that securing start-up funding for new measurement ventures from multiple stakeholders has always been challenging, in the circumstances of the US marketplace, given the commercial challenges facing many industry participants. There is no easy solution to this problem. However, if the industry believes that common solutions have a role to play in supporting the US multi-currency marketplace, our hope is that members will be excited to engage, and that funding will be forthcoming.

What we have outlined here is by no means a full plan. It's the initial outline of an idea. There is much to flesh out, variants of some of these proposals to be explored, and details to be worked out. Our aim is to initiate a positive industry conversation - and we believe now is the time to have this discussion.

## 7. A Future Operating Model for the US JIC

The US market is changing - and changing fast. Measurement and currency initiatives and activities are proliferating, but there is a lack of coordination and alignment. Linear channels may be in decline but they're not dead, and a full transition to a streaming-only marketplace is many years away.

The risks and costs of inaction are significant:



Without a proper competitive third-party measurement ecosystem, advertising revenue will continue to concentrate among a few major players who are able to offer bundled media and measurement on their own terms.

---



Without functional cross-publisher measurement, marketers will continue to lose visibility into incremental reach of each new investment dollar, will be unable to identify absurd over-frequency, and will be unable to assess contribution to effectiveness by publisher.

---



Without better measurement, smaller networks and production firms face mounting challenges in attracting advertisers as more and more revenue flows to dominant walled-garden publishers. Local media companies and niche media outlets will suffer most, despite having valuable audiences, and will find it increasingly difficult to stay afloat independently.

The industry is at a crossroads. Do we simply do nothing, continue on our current path, and hope that the market sorts it out? We are unconvinced that this is the best way forward.

We are not naïve enough to think that what we are proposing will be easy to pull off. However, we do believe that the people who take the time to read this care about advertising, care about measurement and care about this industry. If you do care then you should feel like we do, that we should all be stewards for this business. We should care about measurement being fair, accurate and effective. As an industry, we have an obligation to do something to ensure that it is. This starts with a willingness to have an honest conversation and a genuine interest in doing the right thing for the benefit of all. Or not – what do we know?





cimm

Coalition for Innovative  
Media Measurement

