

# state of media

Q1 2019

CROSS-CHANNEL VIDEO MEASUREMENT 

As brands invest in cross-channel video strategies to reach their audiences with the most engaging content across touchpoints, a measurement strategy that takes all channels into account is vital. This quarter, as marketers enter the upfronts with plans for digital strategies to complement TV advertising, we dig into the factors that go into creating a successful cross-channel video measurement strategy through a conversation with Kinetiq CEO Kevin Kohn; Inscape SVP, Sales and Marketing, Jodie McAfee; and 4C CPO Anupam Gupta.

## Meet the Experts

**KEVIN KOHN**  
CEO



**JODIE MCAFEE**  
SVP, Sales & Marketing



**ANUPAM GUPTA**  
CPO



## Why should marketers care about cross-channel video measurement? What are the obstacles to true cross-channel video measurement?

KK

Cross-channel measurement becomes imperative as video consumption continues to rise and the ways in which we consume video expand. This puts a tremendous amount of pressure on marketers trying to measure the effectiveness of advertising strategies across various media. One big challenge is that these channels don't lend themselves to cross-channel measurement. Linear TV is fragmented and lacks the transparency of digital. Kinetiq is working to overcome this obstacle by creating transparency in TV with a clearer understanding of who was exposed to brand messaging, whether it be in an ad or within the content itself.

JM

People are watching more TV (or video), than ever before, across multiple screens, and in formats that go well beyond linear. As consumer behavior expands, a complete view of TV consumption behavior will require a cross-channel view of the media mix to gain a deeper understanding of audiences, make more intelligent ad-buying decisions, and be better prepared for changes in the marketplace. One of the obstacles is the dependency of media buyers and sellers on legacy data sets that are not delivered in real or near-real time, handcuffing marketers' abilities to measure performance and optimize while campaigns are running. This is table stakes in digital; it should be the same for TV.

AG

A big obstacle to cross-channel video measurement is the inability for marketers to integrate their own *source of truth* data and be able to action on that quickly. Once we move into the realm of real-time data at scale, it's not enough to just get a post-campaign conversion report. How do we build an extensible system where marketers can bring their own conversion/funnel data into the mix, truly tie cross-channel video exposure to the business outcomes that matter to their bottom line, and then act on those insights and optimize campaigns for those outcomes on the fly? We're enabling BYOD (bring-your-own-data) to allow marketers to take advantage of their sales and website data and plug it into the Scope by 4C™ platform for performance measurement and optimization.

Using **audience targeting** for linear TV drove a **lift in web traffic** for a luxury automaker

Source: Inscope

50%↑

## What are the video metrics marketers should use to connect video spend to business outcomes?

KK

The Nirvana state is understanding the customer journey from the minute you put an ad in front of an audience to the moment they make contact with your business. While reach has historically been the main metric for linear TV, it needs to evolve so marketers have the ability to tie their reach back to the audiences that are relevant to the brands.

JM

With connected TV, in addition to household viewership, geographic viewership, and view-time metrics, marketers can now access glass-level, first-party metrics for everything that appears on the screen, and use match key linking to connect the dots between the TV, other devices, and KPI data. In this way, in-the-moment audience data can be gathered across multiple content sources and tied back to business outcomes.

AG

Traditional media metrics like reach and frequency, CPM, and viewability are still valuable proxies, but now marketers have to start combining them with hard business metrics to create measures like cost-per-conversion or cost-per-visit and then unpack the causes for those results. What are the drivers of the conversion? Is it the audience, placement, or creative? How can I optimize my campaign in flight to continue to test and build a strategy that connects those dots? Without the ability to act on the insights quickly, all the best measurement goes to waste.

### Social Media Lift Can Serve as a Complementary Metric to Gauge Impact of TV Ads

#### MARCH 2019 CABLE TV SOCIAL LIFT



**10,813**  
TV AD SPOTS

**79.8%↑**  
TV SOCIAL LIFT IMPACT



**7,853**  
TV AD SPOTS

**69.8%↑**  
TV SOCIAL LIFT IMPACT

Source: Kinetiq & 4C

## What is the timeline for the development of an industry standard for cross-channel video measurement?

KK

A lot of companies are in a race right now to create an identity graph that can connect TV viewing and reach data to first-party data. Kinetiq plays an important role in helping listen to signals to gather information about when and where audiences are seeing TV ads and connecting that with brand data to give a clearer picture of how TV ads lead to measurable outcomes.

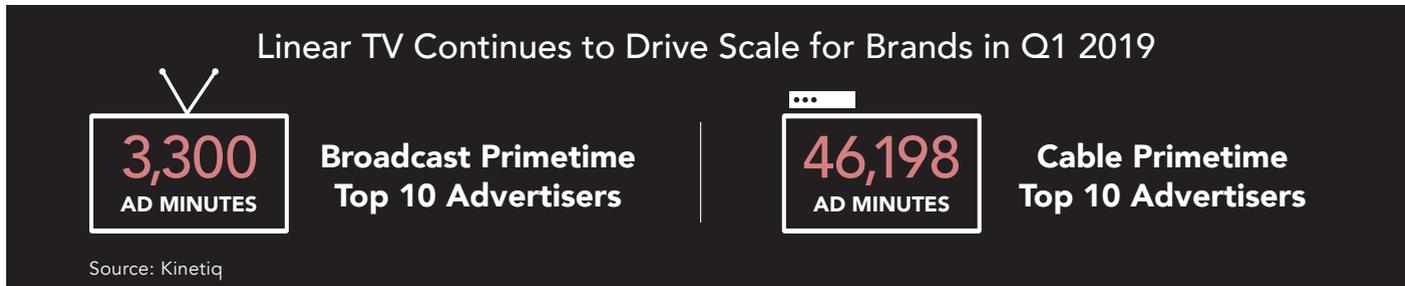
JM

We're encouraged by the positive movement from media stakeholders who recognize the inherent flaws in legacy data sets and measurement solutions. *Currency* is still an important component of any media exchange, and all of the players have spent years developing systems around legacy currency and measurement products. Assuming that the market not only migrates to, but fully adopts, the idea of attribution and business outcomes as a core component of any measurement standard, then a scaled footprint of connected TVs that provide a match key will be critical.

Project OAR (a consortium of leading media companies including Disney's Media Networks, Turner, Xandr, Comcast's FreeWheel and NBCUniversal, CBS, Discovery, Hearst Television, AMC Networks, VIZIO, and Inscope) is working to build an open standard for addressable TV advertising at scale. An agreed foundation that combines the uniformity of a standard with flexibility for inventory owners will only serve to accelerate adoption for connected devices.

AG

We definitely need continued collaboration between stakeholders in the industry to coalesce around best practices for measurement. But we shouldn't wait for an industry standard to focus on the connective tissue between audiences and outcomes, between real-time optimization and actionability. Marketers have to be accountable to the KPIs that drive their businesses now.



## How do you define TV? How do you define video? What's the difference?

KK

These worlds are converging for both consumers and marketers, as access to high-speed broadband makes it possible to consume video across all devices and formats. OTT which adheres to a more digital footprint, is accelerating this convergence, forcing linear TV to evolve. Linear TV advertising is still a \$70 billion business and the most effective way to reach targeted audiences at scale, yet brands are having trouble understanding attribution for their investments. This needs to change and it will. Bringing the transparency of digital and OTT to linear TV will completely change the game.

JM

TV is no longer limited to the box in the living room, it's undergoing its biggest transformation. Audiences are consuming content not just on linear, but on mobile devices, PCs, connected TV devices and smart TVs. I would describe TV and video both as professional (studio) and creator-based content made for multi-channel distribution and viewing, whether via a subscription or ad-supported model.

AG

The new TV landscape facilitates the consumption of long-form professional content, agnostic of the device and delivery mechanisms. Consumers don't make the distinction between Linear TV and OTT, Connected TV – they just want to watch their shows or sports in the most convenient way.

Video as an immersive format plays a huge role in effective storytelling – so a holistic marketing strategy should also include social video. Publishers and media companies must continue to evolve to meet consumers across channels and devices to help marketers drive business outcomes.

52%

Source: 4C

of **social ad spend** in Q1 2019 through the **Scope by 4C™** platform was **video**.

## What is the future of measurement in a world with non-interruptive advertising in video content?

KK

More and more marketers are realizing the value of conveying their brand messaging within the content and not just relying on the thirty-second spot. Historically, companies that have monitored a brand's presence on TV have focused on national networks and paid advertising, but they're missing everything in between the ad pods, which is actually where audiences are most engaged. Kinetiq is changing that by monitoring not only paid mentions, but also earned mentions and brand sponsorships within content.

JM

At the risk of providing a simplistic response, so long as money is changing hands for the purposes of one party guaranteeing an audience and another party paying for access to that audience, particularly in an ad-supported model, then a verification of eyeballs will continue to exist, and a measurement solution is core to that dynamic. And any such solution will need to be flexible and sophisticated enough to support the depth and breadth of distribution channels and access points.

AG

The overall ad experience, especially in a streaming environment, has to improve. This probably begins with reducing ad loads and better handling frequency capping, but, of course, the formats will also evolve. Marketers and content producers are only limited by their creativity. In the end, it all comes back to driving business outcomes.

### The Analyst View

**Effective media planners and buyers need to be fluent in data sources beyond traditional TV panel and survey data sets.**

Jim Nail and Arleen Chien, Forrester Research, *Sales Guarantees Creep Into TV Ad Buying*, April, 2019

**A growing number of brands are investing in analytics and data science teams to break down measurement and planning barriers.**

Eric Schmitt, Gartner, *How to Put Over-the-Top TV Advertising to Work*, February, 2019

4C is a global data science and marketing technology company that delivers self-service software for brands to execute video-centric marketing and optimize business outcomes. Leading brands, global agencies, and media owners trust the **Scope by 4C™** platform to identify their most valuable consumers and reach them across channels and devices. With nearly \$2 billion in annualized advertising spend running through Scope, 4C enables self-service activation on linear television and social media, over-the-top content, and digital commerce. Founded in 2011 and based in Chicago, 4C has staff in 16 worldwide locations throughout the United States, United Kingdom, the Netherlands, France, Hong Kong, India, Singapore, and the Philippines. Visit [www.4Cinsights.com](http://www.4Cinsights.com) for more information.

