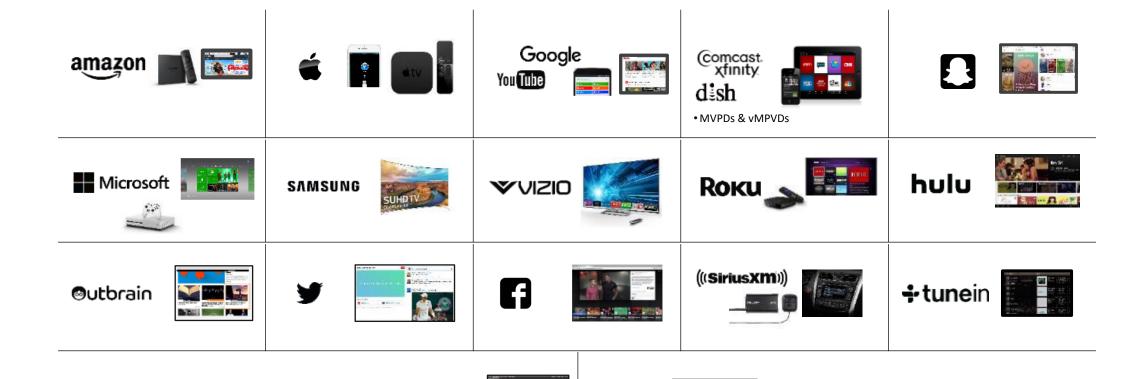
# The Digital vs. Linear War is Over: Convergence is Here

CYNOPOSIS BOOTCAMP

# WHAT WE KNOW.

## 1. Viewer fragmentation continues.

Microsoft

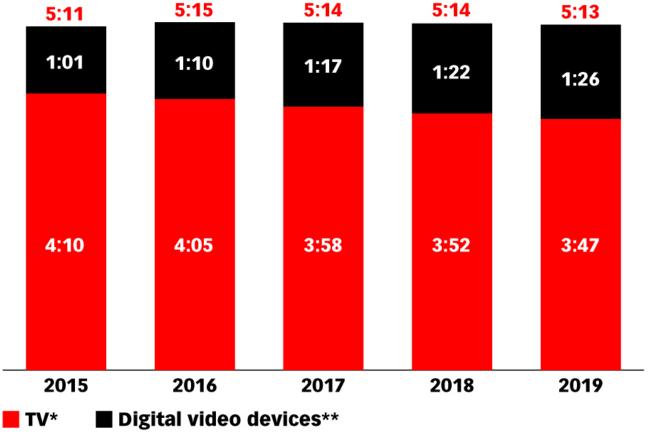


Source: Turner.

# 2. Video consumption on digital devices increases.

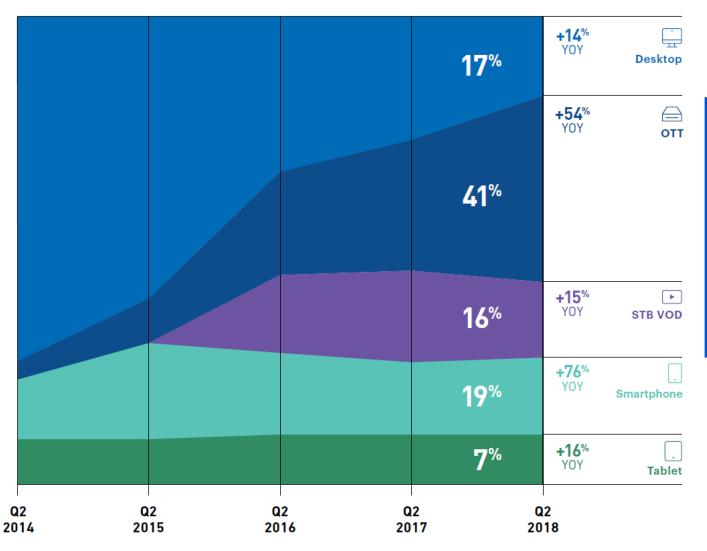
### **Average Time Spent per Day with Video by US Adults, by Device, 2015-2019**

hrs:mins



Source: eMarketer, September 2017.

### DIGITAL VIDEO AD VIEW COMPOSITION & GROWTH BY DEVICE



# 3. Viewing hasn't left the big screen.

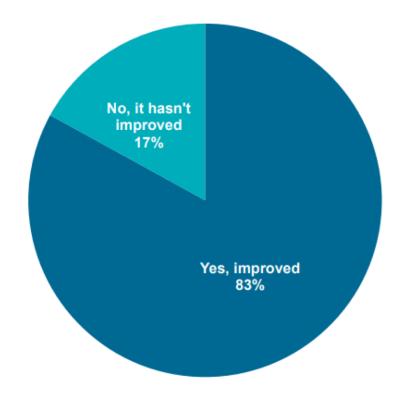
57%
of all ad views are now delivered via OTT or STB VOD

Source: FreeWheel Video Monetization Report 2Q18

# 4. Existing measurement is imperfect.

Source: IAB Video Ad Study, April 2018. Do you think cross-platform ad measurement has improved compared to a year ago?

### Nearly 1 in 5 marketers do not believe cross platform ad measurement has improved



Not all viewer end points are measured

- Platform walled gardens
- Cost and complexity of implementation
- No deduplicated R/F across end points

- Not all viewer end points are measured
- No industry consensus on available third-party measures

- comScore vs. Nielsen vs. other?
- Variation within agency holding companies
- Variations in publisher solutions

- Not all viewer end points are measured
- No industry consensus on available third-party measures
- Lack of synchronous industry systems

- Agency systems
- Publisher ad tech
- Inconsistent KPIs

- Not all viewer end points are measured
- No industry consensus on available third-party measures
- Lack of synchronous industry systems

## NO INDUSTRY STANDARD

# WHAT WE ARE DOING.

### 1. Investing in STB VOD transparency.

### **PAST**

Apply
LINEAR VPVHs
to STB VOD campaign
delivery



**PRESENT** 

Apply
NETWORK VOD VPVHs
to STB VOD
campaign delivery



**FUTURE** 

Apply
PROGRAM VOD VPVHs
to STB VOD
campaign delivery

### 2. Advancing OTT accuracy.

### Watching OTT is like watching linear TV

One OTT impression may be viewed by more than one person



LINEAR / STB VOD / OTT

### **OLD:**

(OTT ad server impressions) x (DESKTOP demo % comp)

**Billable OTT Impressions** 

### **NEW:**

(OTT ad server impressions)

x (co-viewing factor)

x (OTT demo % comp)

Billable OTT Impressions

### 3. Turner Unified Plan

Linear + non-linear with a single impression guarantee

- ✓ Simplify cross-screen deals into a single order
- ✓ Measure campaign delivery across all platforms
- ✓ Provide a single post-buy campaign report

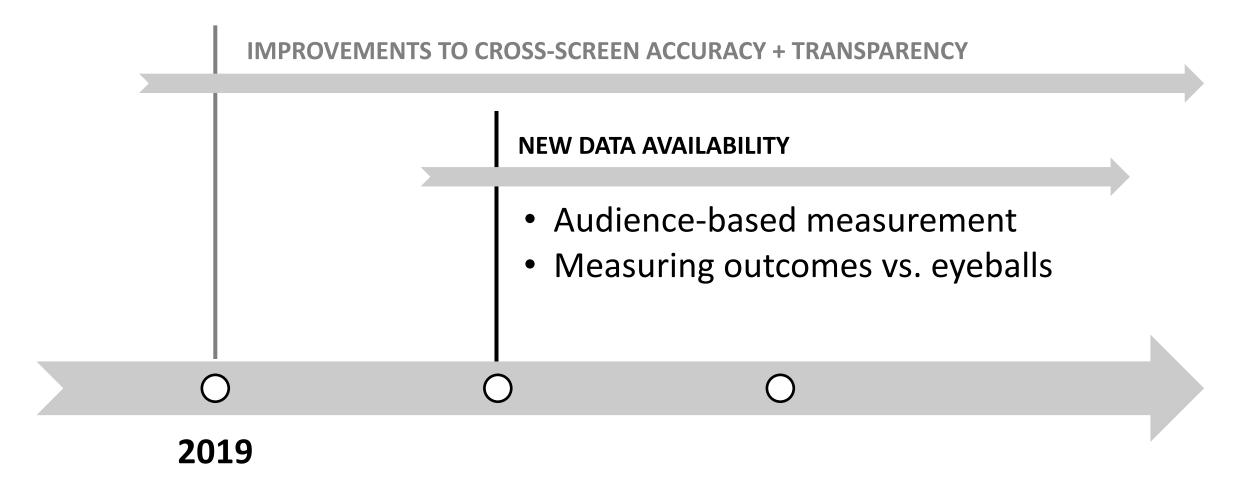
# WHAT'S NEXT?

### **Measurement Roadmap**

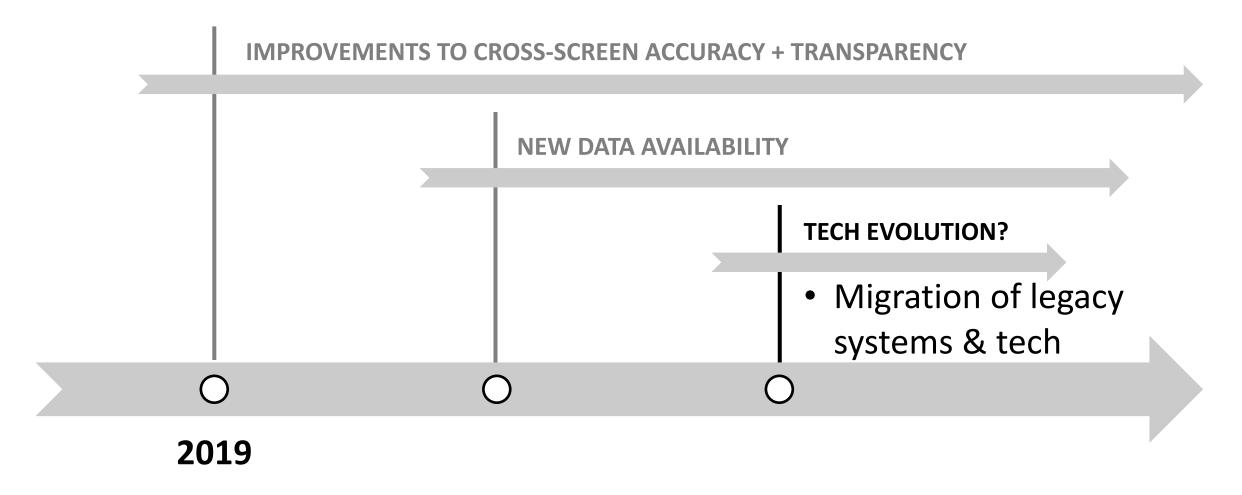
**IMPROVEMENTS TO CROSS-SCREEN ACCURACY + TRANSPARENCY** 

- Nielsen DAR
- comScore VCE OTT
- comScore Campaign Ratings
- Agency/Publisher Solutions

### **Measurement Roadmap**



### **Measurement Roadmap**



## Thank you.

### **Beth Rockwood**

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