

# **centro**<sup>®</sup> **INSTITUTE**

Thanks for joining, we'll begin shortly.



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GREAT RESULTS FOR**

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**6,000+** Brands

**200,000+** Campaigns

**Over \$2BN+** digital media spend via Basis

**750+** Centrons in **44** offices

**Innovators** in ad technology

**Commitment** to education

Featured Speaker



**Jim Nail**  
Principal Analyst  
FORRESTER®

# Video Evolved: The Omnichannel Opportunity

*Imperative*

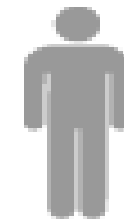
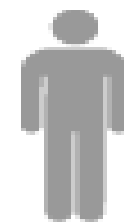
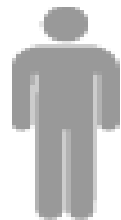
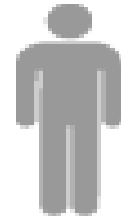
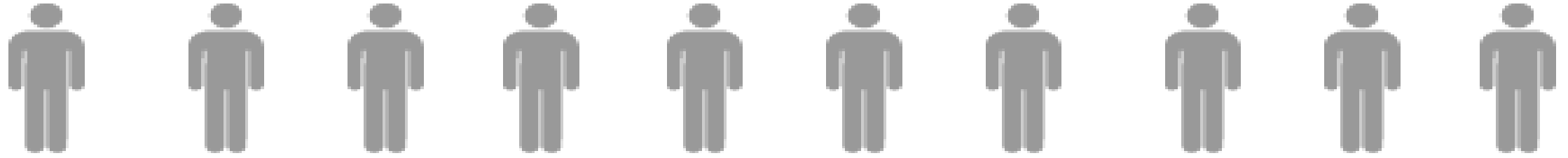
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Jim Nail  
Principal Analyst

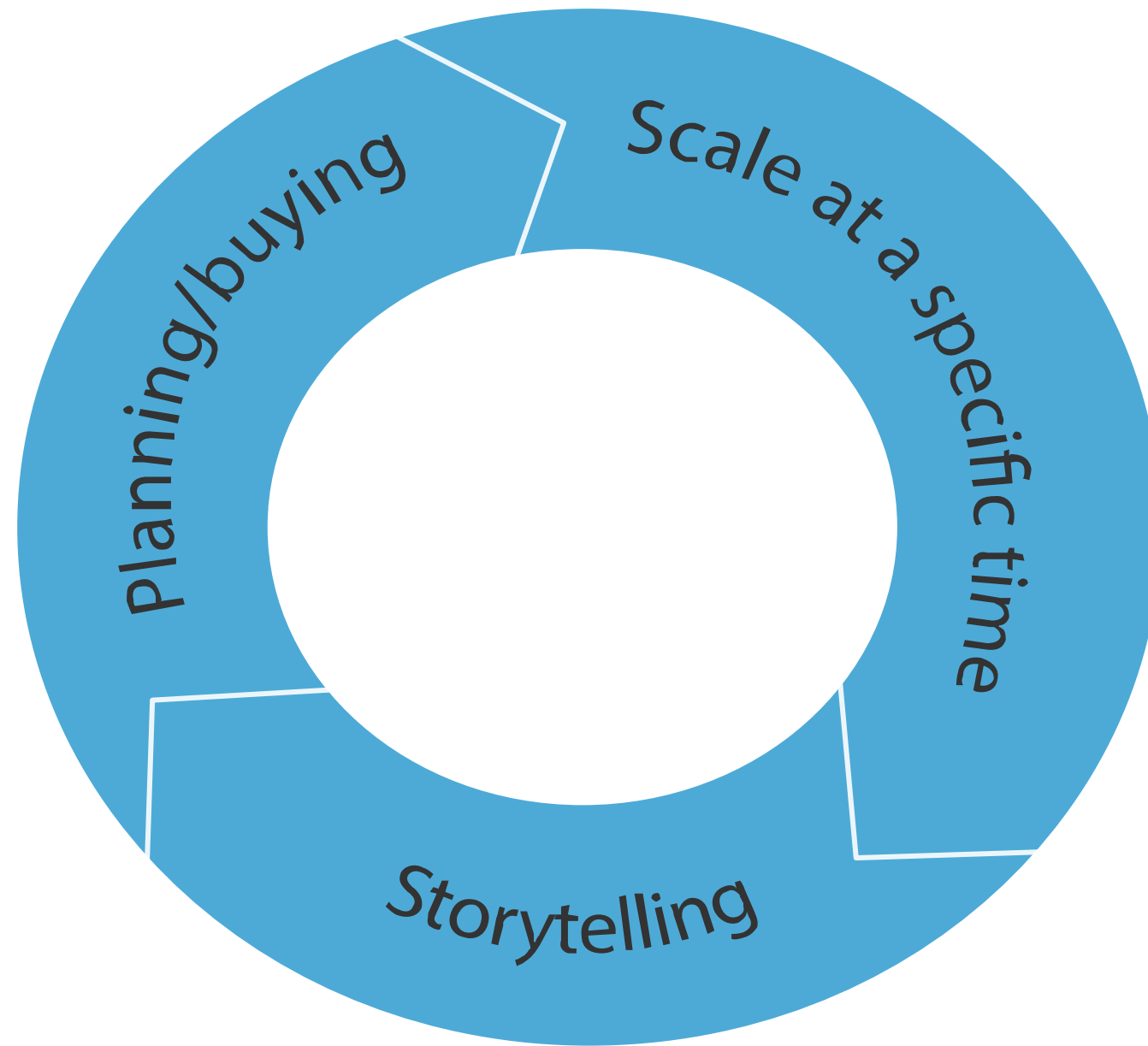
BOLD

AT

WORK

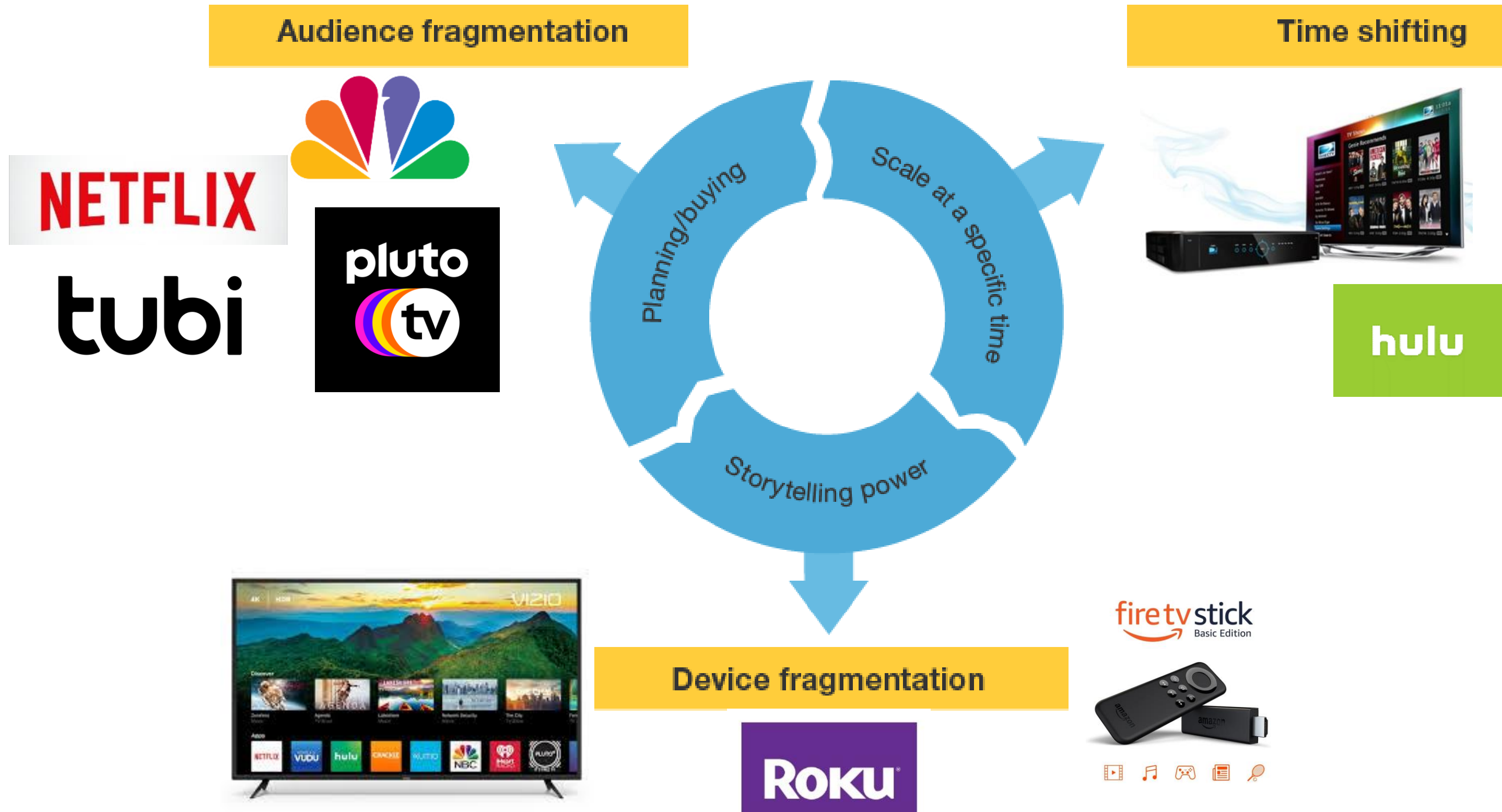


# Three advantages have defended TV



See the Forrester report "[OTT Ushers In A New Era For TV](#)"

# TV's Advantages Erode





# TV's Tectonic Shift Just Happened

*Jim Nail, Principal Analyst* May 14 2019

- Disney's Iger further elaborated on this strategy at the [MoffetNathanson Media & Communications Summit](#) this morning. While saying that the cable bundle was

still important, he diplomatically noted that the 1 as appealing as it used to in the eyes of consumers that Disney is not purposely trying to damage the come to grips with reality that this trend can't be Translation: "Winter is coming. Time to prepare

We spent the last couple of years completely transforming the Walt Disney Company making strategic acquisitions and organizational changes to focus the resources and immense creativity across the entire company on delivering an extraordinary DTC experience unlike anything else in the market. With the launch of Disney Plus, we're making a huge statement about the future of media and entertainment and our continued ability to thrive in this new era. Bob Iger, Disney Q4 2019 earnings call



## Q1 2020 Proves Streaming Is Essential To Consumers And To The Future Of Media Companies

Jim Nail, Principal Analyst APR 27 2020



MARKETS BUSINESS INVESTING TECH POLITICS CNBC TV

### Netflix blows away new subscriber expectations

PUBLISHED TUE, APR 21 2020•3:34 PM EDT | UPDATED TUE, APR 21 2020•8:15 PM EDT

### Fox Corporation to Acquire Tubi

Acquisition of Tubi, a Leading Free Ad-Supported Streaming Service, to Diversify FOX's Direct-to-Consumer Offerings and Advertising Solutions

NEWS PROVIDED BY

[Fox Corporation](#) →

Mar 17, 2020, 17:04 ET

The New York Times



By Brooks Barnes

April 8, 2020

### *Disney Plus Racks Up 50 Million Subscribers in 5 Months*



AUTHOR

Robert Williams

PUBLISHED

March 3, 2020

### ViacomCBS showcases Pluto TV refresh with \$30M campaign amid growing competition

AdAge

Special Report: TV Upfront →

## ANA CALLS FOR CHANGES TO TV UPFRONT

Advertiser group looks for shift to calendar year to improve productivity and transparency

By [Jeanine Poggi](#), Published on June 10, 2020.

Special Report: TV Upfront →

## FLEXIBILITY IS KEY AND MARKETERS CALL FOR A REVAMP OF THE UPFRONTS: AD AGE TV PIVOT

By [Ethan Jakob Craft](#), Published on May 12, 2020.

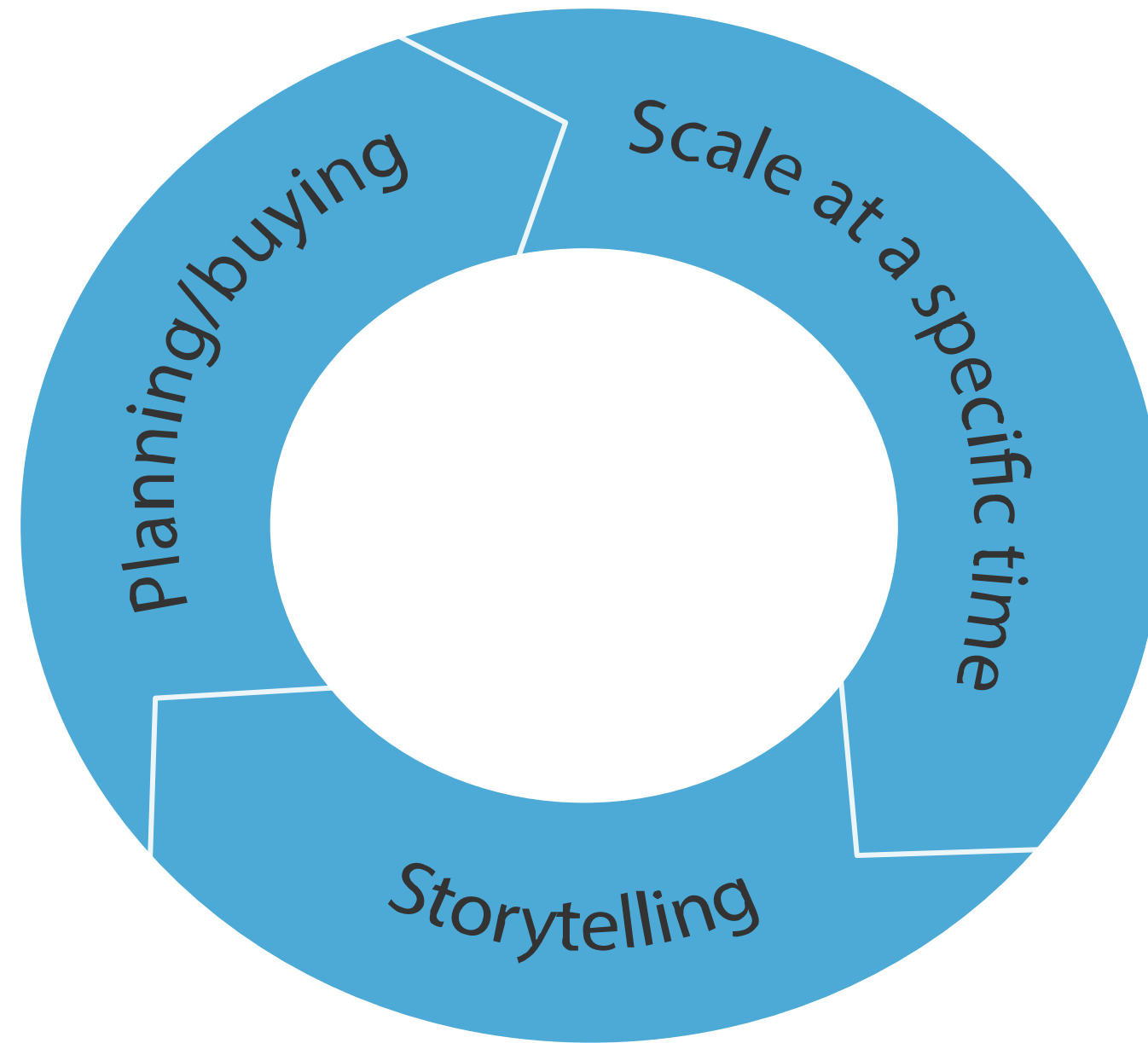
Special Report: TV Upfront →

## MEDIA BUYERS PREDICT UP TO 30 PERCENT OF THIRD-QUARTER TV AD COMMITMENTS COULD BE PULLED: AD AGE TV PIVOT

Need for 'flexibility' may lead to long-term wariness, marketing pros warn

By [Ethan Jakob Craft](#) and [Jeanine Poggi](#), Published on May 14, 2020.

# Industry 1 – 3 year task: reconstruct TV/video advantages



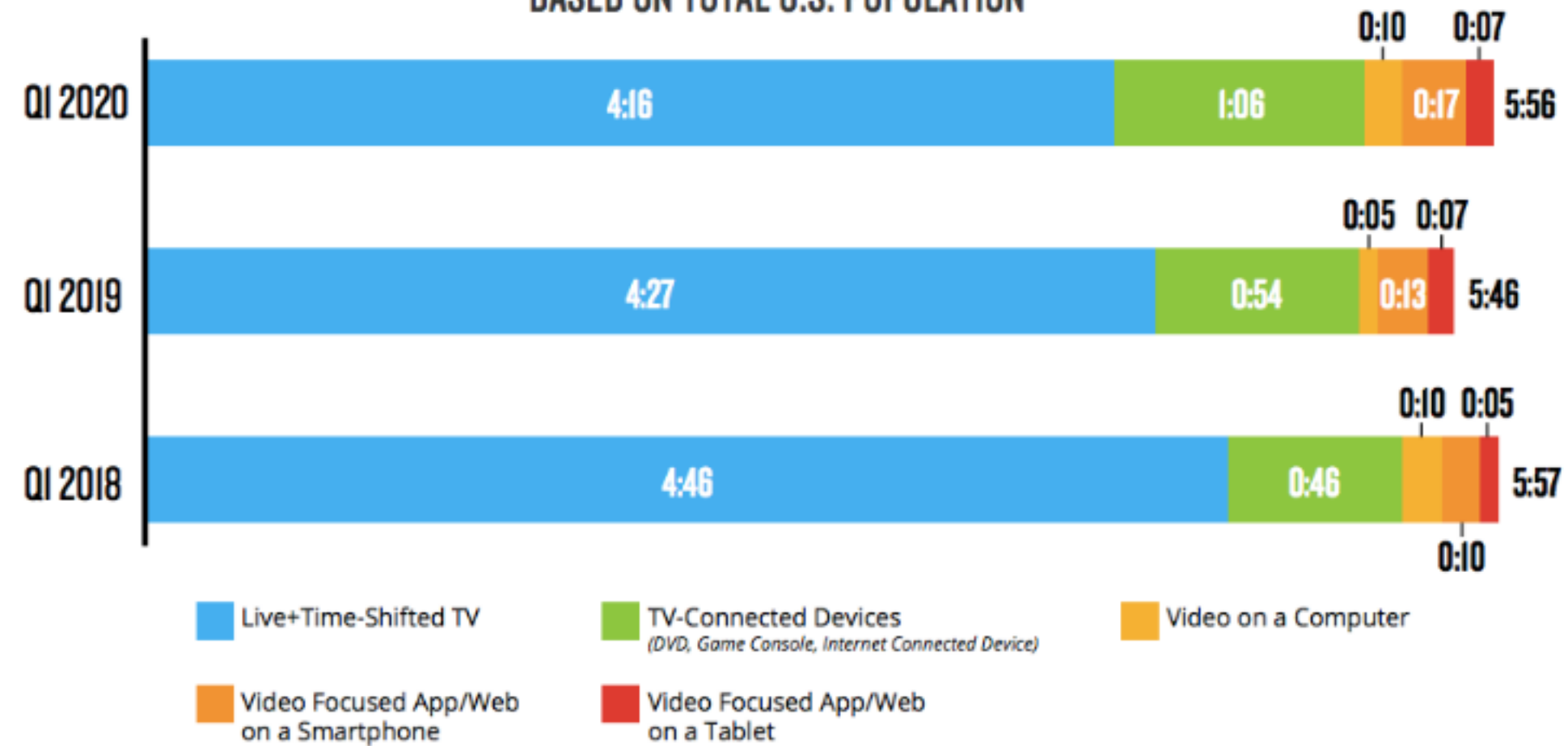
# Three immutable laws of TV advertising

# 1. People will watch multiple hours/day



## AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON VIDEO

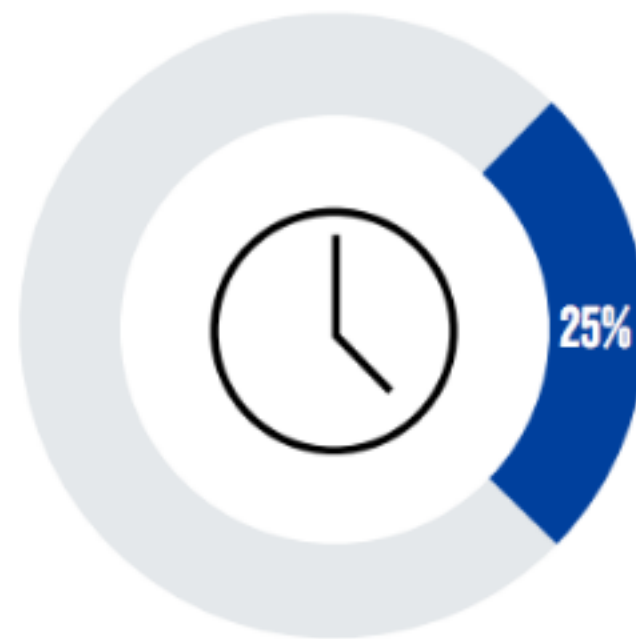
BASED ON TOTAL U.S. POPULATION



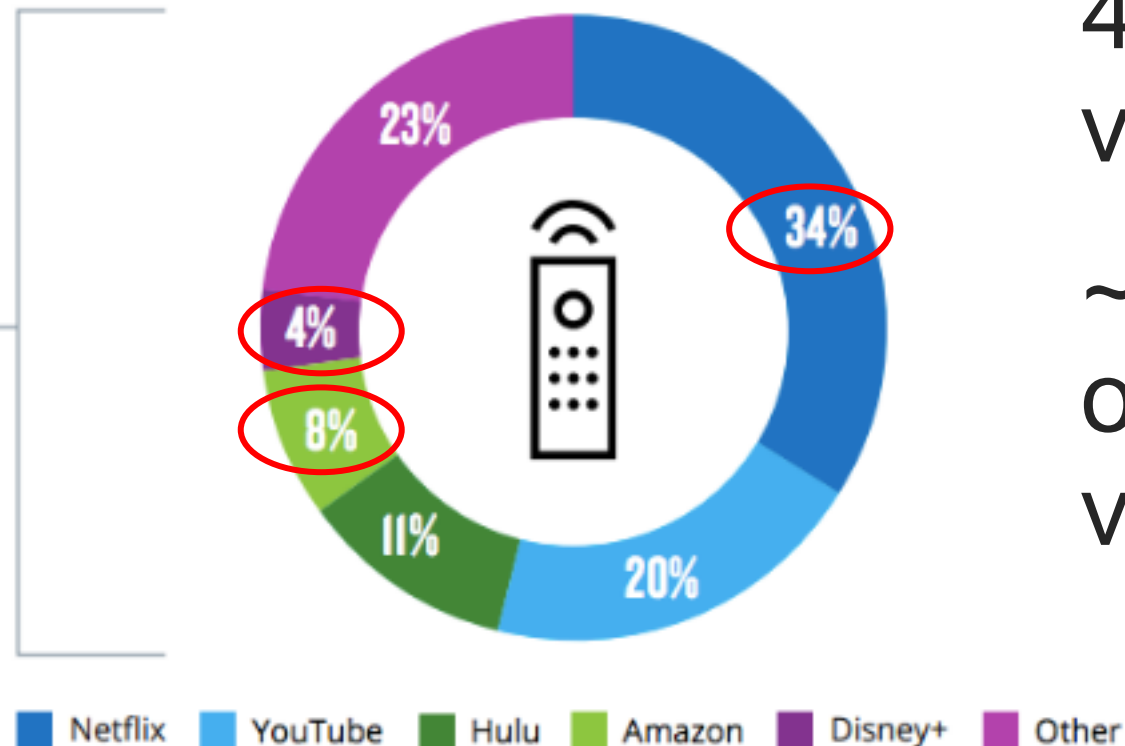
Source: Nielsen Total Audience Report, Q2 2020

# Ad opportunities will decrease

**% OF STREAMING OUT OF  
TOTAL USAGE OF TV**  
Q2 2020, P2+



**VIDEO STREAMING DISTRIBUTION  
% BY BRAND**  
Q2 2020, P2+



46%+ of streaming viewing is ad-free  
~30 fewer minutes of ad-supported video

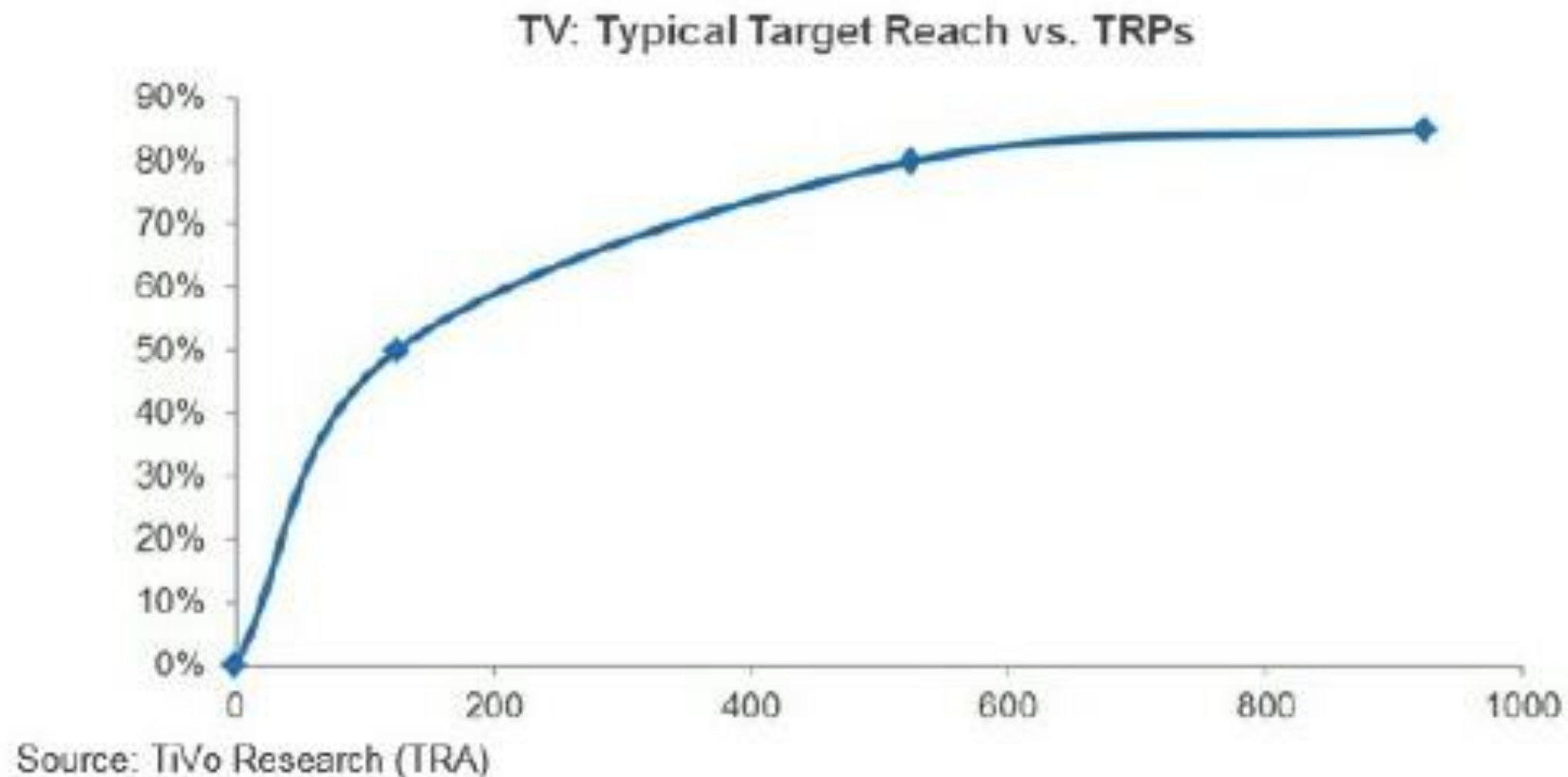
Source: Nielsen Total Audience Report, Q2 2020

## 2. Advertising has two goals:

- Build an emotional bond
- Turn interest into action



### 3. Reach, not impressions or GRPs, drive results



Source: Media Village, <https://www.mediavillage.com/article/what-we-have-learned-about-tv-and-digital-advertising-part-1/print/>

And some not-so-  
immutable laws of  
TV advertising

The changing landscape requires new skills,  
tools, and processes

# Audience-based buying redefines scale

Advanced TV is a way of serving fewer impressions.

There are only 1.7 million luxury cars sold annually in the US, so I don't need to reach tens of millions of people if I can reach the right ones.

Scott Martino  
Manager, Marketing Analytics  
Audi

# Audience-based buying redefines scale

- Adapt legacy concepts such as brand development index (BDI) or category development index (CDI)
- New TV viewership data sets enable audience targeting
- More detailed understanding and definition of strategic audience (s).
- Knowledge of different data sets to translate definition into buying/targeting criteria.
- Tolerance for differences across channels, media companies

# Data is more powerful than distribution



- Platform for cross-channel audience analysis and planning
- Media companies invested early in data assets
- Technical ability to synch brand audience definitions data with network systems and data sets

# Time for a creative renaissance

- Creative impact is greater than media impact
- Embrace the long-term brand building ability of video
- Data, addressability open new possibilities
- Measure emotional effectiveness
- New strategies: sequencing, dynamic creative
- New ad formats: pre-roll, viewer ad preference
- Incorporate new data to enrich planning

# Resonance between ad and content boosts effectiveness



## Quantifying the ROI Impact of DriverTag™ Context Resonance

Final Full Report of First ARF "How Advertising Works" Context ROI Case Study

Bill Harvey, RMT and Howard Shimmel, Turner

The result showed that across the 15 ads tested, if all GRPs could be equally allocated **across the top four deciles of DriverTag™ Resonance between ad and program, the ROI would be lifted an average of +36% . LEAP**

# Evolve metrics toward marketing objectives

- View impressions, GRPs properly as diagnostic metrics
- Resist the siren's song of "TV attribution"
- Industry needs more clarity around delivery, communication effect, and impact metrics.
- Clearly define campaign objectives in quantifiable ways
- Tailor measurement process to objectives
- Build internal benchmarks



# Build a bridge between TV and digital video



“It’s easier for digital buyers to learn TV than for TV to learn digital. But many digital people underestimate the strategy and business dimensions of TV.”

Matt Spiegel  
General Manager  
Marketing and Technology Solutions  
Medialink

# New tools bridge traditional and digital skills

**FORRESTER** [Research](#) [Events](#) [Analytics](#) | [Blogs & Podcasts](#)

For B2C Marketing Professionals

**The Forrester New Wave™: Cross-Channel Video Advertising Platforms, Q3 2019**

The 13 Providers That Matter Most And How They Stack Up

August 29, 2019 | Updated September 4, 2019

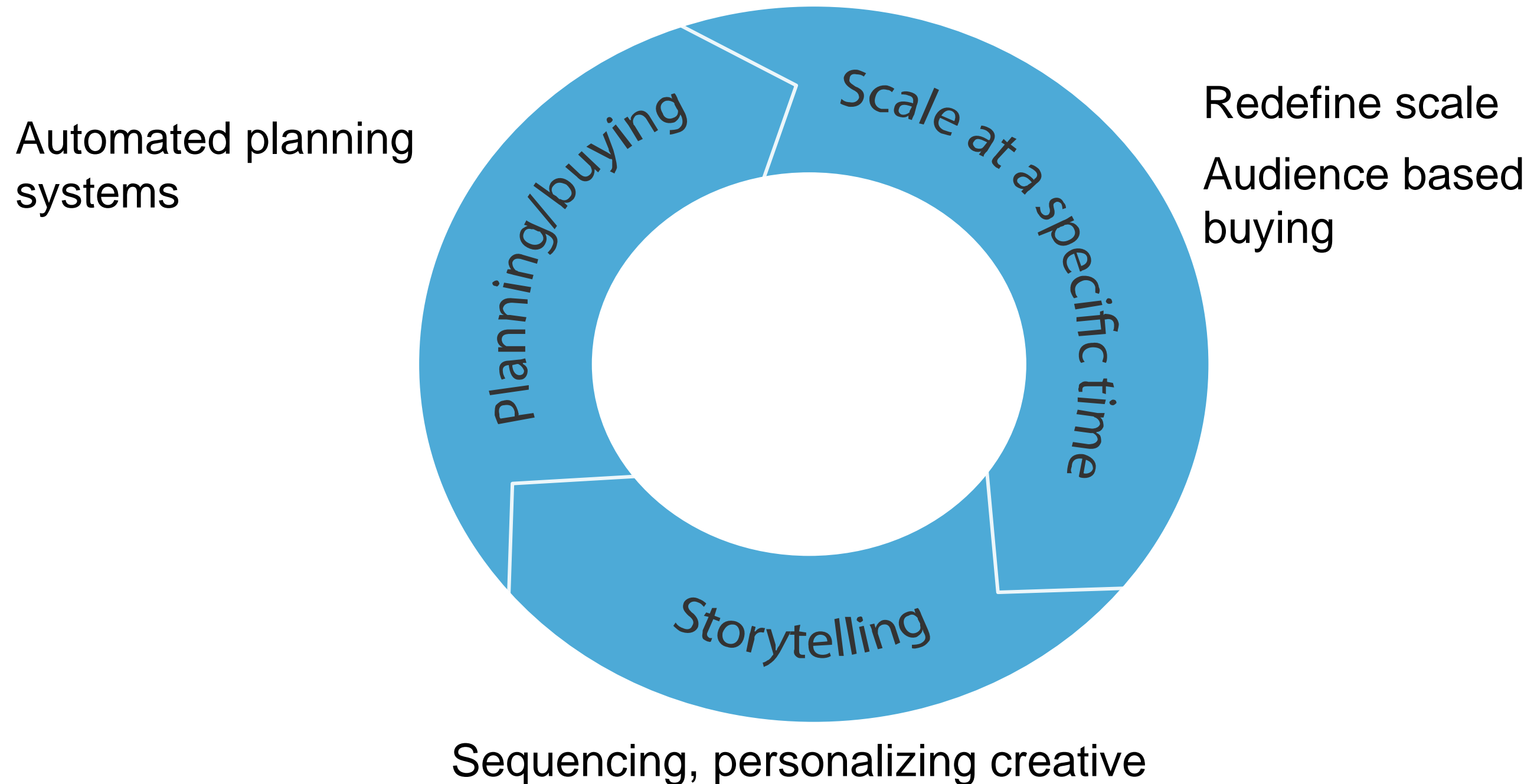
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By [Joanna O'Connell](#), [Jim Nail](#) with [Brigitte Majewski](#), [Robert Perdoni](#), [Christine Turley](#)

[Request an Inquiry](#)

**CROSS-CHANNEL VIDEO ADVERTISING PLATFORMS RESTITCH AUDIENCES**

# Redefine TV's strengths in the omnichannel world



# Thank You.

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**Jim Nail**  
**Principal Analyst**

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**QUESTIONS?**  
**THANK YOU!**