IMAGINE&

Forces of Change

REDEFINED MEDIA LANDSCAPE

The Unreachables

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WELCOME

For our book, Beyond Advertising: Creating Value Through All Customer Touchpoints, the Wharton Future of Advertising (WFoA) program enlisted over 200 global leaders to consider the future of advertising, marketing and, by extension, business.

Not surprisingly, the research directed by Wharton Marketing Professor Jerry Wind, co-founder of WFoA, has found that the fundamental relationships among brands, media and people are transforming at an unprecedented rate, and, just as businesses large and small try to adapt, along comes a new disruption. In our book, we identify five central Forces of Change accelerating these shifting dynamics:

1. **An expanded, redefined media landscape**
2. **Rapid, breakthrough advances in science and technology**
3. **Skeptical and empowered people;**
4. **A disruptive cultural, social and geopolitical environment in a hyper-connected world**
5. **The emergence of disruptive and compelling new business and revenue models**

The most profound implication of our research is that entrenched business practices must be challenged if businesses hope to succeed. Rather than making short-term, reactive adjustments to these forces, the collective wisdom of our collaborators proposes adopting wholly new mindsets and approaches that will harness and leverage these forces to enable desirable outcomes—not only for advertisers and their collaborators, but also for their audiences and the society in which they operate.

To bring the principles of the book to life, Hearts & Science sponsored an initiative with WFoA to create a platform for stakeholders across the agency, brand, publisher, and measurement world from which to share insights and practical perspectives that emerge when putting the Beyond Advertising model and roadmap into practice. Hearts & Science is an award-winning, data-driven marketing and media agency in the thick of addressing and harnessing the forces of change our research identified, for its clients and its own business.

This collaboration is intended to spark conversation and debate, and spur action within the industry to address the challenges these forces create.

Force I: An Expanded, Redefined Media Landscape

If we reimagine advertising and marketing from the audience's point of view, every interaction, direct and indirect, affects the consumer's relationship with a brand. Yet traditional measurement and attribution models rarely capture the synergy across media and often miss certain media—and all non-media—touch points. The result is that "media planning" tends to address a very narrow opportunity set.

Even within the digital landscape, traditional measurement platforms have struggled to keep up with the seismic shift of consumption away from linear TV to mobile, tablet and over-the-top (OTT) devices. Much of the video usage among younger audiences is difficult to track. Brands and agencies, therefore, struggle to plan against and reach this audience.

Hearts & Science and their partners at Omnicom Media Group studied this data gap. Specifically, they set out to understand just how much media usage wasn't captured by traditional tools and how large this audience of "Unreachables" might be. The results are worth the attention of marketers: They found that nearly half (47%) of Millennial and Gen X audiences aren't currently tracked by traditional TV tools.

In the pages that follow, we'll provide insights into this growing audience of "Unreachables" from multiple vantage points, including those of marketers, agencies, publishers, measurement companies—and, of course, Millennials and Gen Xers themselves. We'll explore how the problem has arisen and potential industrywide solutions. And we'll consider the implications for marketers who seek to leverage this new, expanded media landscape to connect more meaningfully with this desirable audience.

We welcome your thoughts and feedback—and encourage you to leave us your comments with #forcesofchange.

Catharine Hays
Former Executive Director
Wharton Future of Advertising Program

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POINT OF VIEW

The Unreachables:

HOW MARKETERS ARE MISSING A GENERATION OF "UNREACHABLES"

By Scott Hagedorn, CEO and Founder, Hearts & Science

It's no secret we are witnessing a seismic shift in media consumption behavior. As of 2017, one in three "young households," wherein the head of household is under 35 years of age, does not subscribe to a traditional (cable or satellite) TV subscription, according to Nielsen. Time spent with mobile apps will comprise nearly 20% of *total* media consumption this year, and 84% of time on mobile devices, eMarketer says.

Mobile and streaming innovation bring about new creative opportunities, but they also create a big problem: Nearly two-thirds of this consumption isn't being captured by traditional measurement platforms. And if it can't be measured, it can't be properly targeted or planned against as part of a cohesive, cross-platform campaign.

In fact, new survey and ethnography research that Hearts & Science conducted with Omnicom Media Group found that the TV and video consumption of 47% of Millennials and Gen Xers—a segment we call MGXes, encompassing the 22 to 45 age range—isn't effectively captured by the TV measurement currency. We call this audience segment "The Unreachables" because the industry systems of record for planning and measurement guides media buys away from reaching them.

The Unreachables, mostly Millennials and Gen Xers, are highly sought after by our clients. Whether "cord-cutters" or "cord-nevers," they represent trillions in spending power and growth segments for businesses worldwide. And Unreachables aren't as elusive as they seem, but in order to reach them, one must look beyond the current incumbent TV planning and measurement tools.

Traditional measurement firms like Nielsen, comScore and Kantar do an adequate job estimating content and advertising audiences on traditional TV screens, but there are big gaps in the data when it comes to measuring content and ad exposure in app on mobile and tablet devices, on OTT devices like Apple TV and Roku and via streaming services like Hulu and Netflix. Admittedly, some progress is being made now with Hulu and YouTube's upcoming streaming services.

The reason behind the gap is partly technical and partly philosophical. On the technical side, major media companies have been slow to adopt Nielsen's Digital Content Ratings Software Development Kit (SDK), since this involves integrating code to measure in app content and ad consumption—at the publisher's expense —on literally every platform, device and client app supported by that publisher. This technical limitation alone ensures that new and emerging publishers will never be measured, nor will universe estimates (which are used to calculate reach) include publishers who choose not to integrate the Nielsen SDK.

Furthermore, Nielsen Digital TV Ratings do include streaming TV content via digital OTT devices, mobile apps and browsers, but only if the digital content and ad load is *identical* to that of the original broadcast —an obviously absurd requirement that negates the power of dynamic digital targeting and therefore includes very little digital viewership in these measures.

Perhaps the more fundamental issue, however, is philosophical: traditional, panel-based approaches to TV measurement are old-school technologies designed for old-school media. Panel sizes are too small to represent advanced targeting (beyond age/gender demos) and the TV-centric measurement methodology doesn't accurately reflect today's

consumer viewing patterns. In short, they leave advertisers with a generation of Unreachables.

So what's a marketer to do?

Ultimately, we envision a future wherein traditional ratings will cease to matter. The days of yore wherein the panel served as the proxy for an audience—setting behavior, reach and cost estimates—fall out of the picture. Google and Facebook, along with telecom "pipes" like AT&T and Verizon and retailers like Amazon have massive install bases that are logged in across screens, making identity-based marketing not only feasible but the most accurate solution to capture these new consumer behaviors. We'll no longer need the panel as proxy for an audience, as we'll have a deterministic view of the people in the audience. Identity-based marketing becomes the solution that holds consumer identity as the currency against which we measure, plan and buy media across devices and platforms. As many of these platforms own the consumer experience from end to end, not just identifying their audience at a granular level, but also creating the content being consumed, it's only a matter of time until these identity-based currencies and identity-based experiences become the marketer's art. In the meantime, agencies and brands

will—*together*—need to rewrite the media planning and buying playbooks. We'll update planning systems to account for the glaring gaps in the measurement data and will look to leverage new mobile data sets as they emerge. We all must champion the adoption of *open* SDKs that make it easier for publishers and broadcasters—and their audience—to be counted. Most important, we encourage brands to get their customer data in order so they'll be ready to leverage identity-based marketing to competitive advantage. After all, the ability to reach future audiences depends on it. ⊚

> "
> Traditional, panel-based approaches are old-school technology designed for old-school media.

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BY THE NUMBERS

Who are THE UNREACHABLES?

un·reach·ables

\ ˌən-ˈrē-chə-bəl \

The growing audience of Millennials and Gen Xers who aren't tracked— and therefore can't be targeted or measured—by today's standard of TV and video measurement.
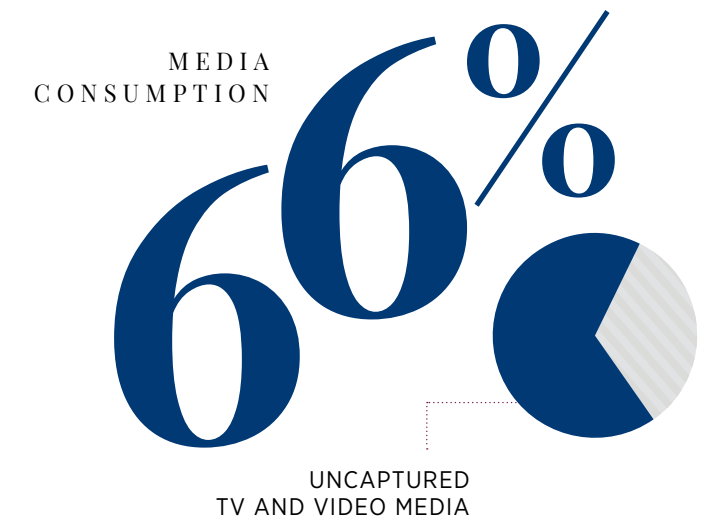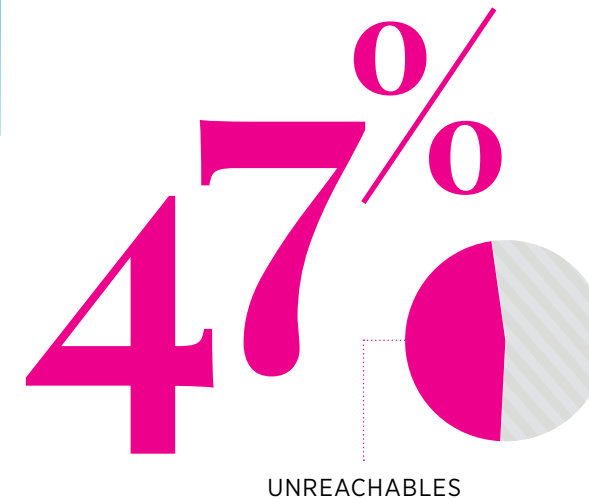
## HOW BIG IS THE PROBLEM? *Pretty big.*

Unreachables comprise 47% of all Millennials and Gen X.[1] 66% of Millennial and Gen X TV and video consumption **isn't captured** by traditional measurement platforms.[2]

47%

UNREACHABLES

MEDIA CONSUMPTION

66%

UNCAPTURED TV AND VIDEO MEDIA

THEY'RE MOBILE FIRST. *Or mobile only!*

1 in 3 Young Households (Head of Household <35) does not have a cable or satellite subscription.[3]

30% drop in time Millennials spend with traditional TV over past six years.[4]

33% DO NOT SUBSCRIBE

TV SUBSCRIBERS

30% DROP

TIME SPENT WITH TV
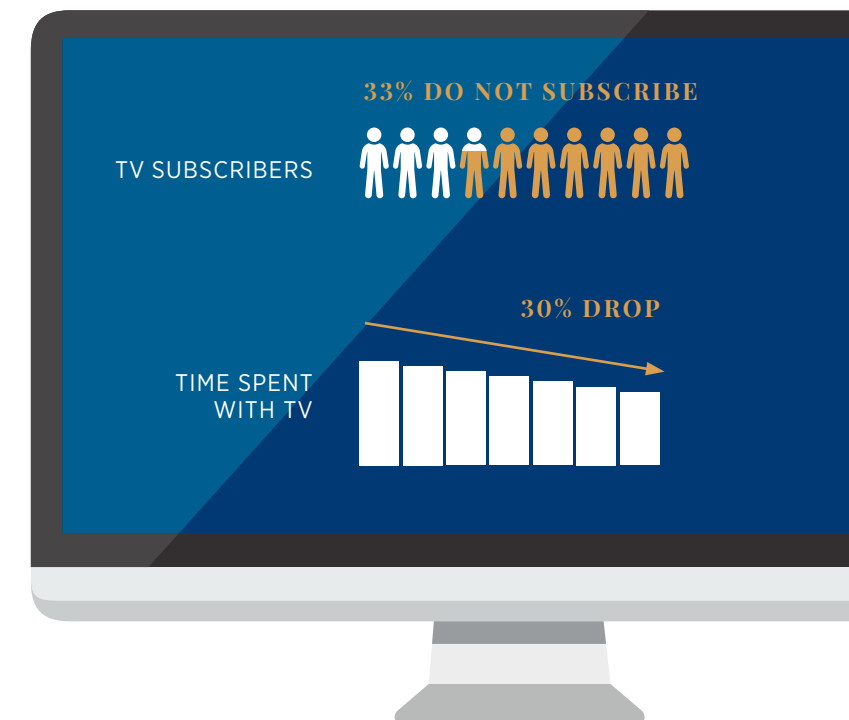
1 Omnicom Media Group, 2017 2 Hearts & Science and Omnicom Media Group, 2017 3 Nielsen, NPower, 2017
4 Nielsen Comparable Metrics Report, 2016

84% of time on mobile is in app—**which requires SDK integrations for tracking!**[5]

84%
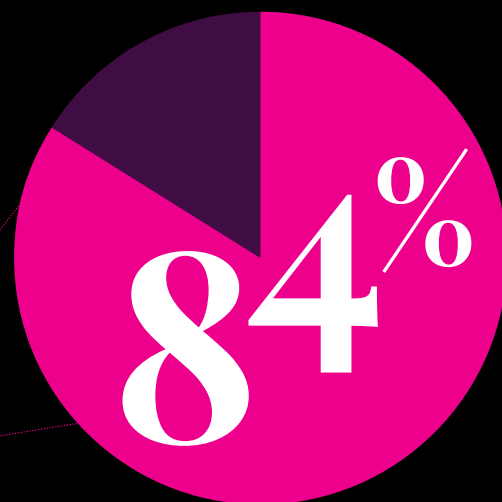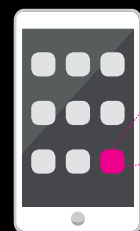
AMOUNT OF MOBILE
TIME SPENT IN APP

IN 2016, SMARTPHONE REPLACED TV AS **THE MOST USED DEVICE AMONG MILLENNIALS.**[6]
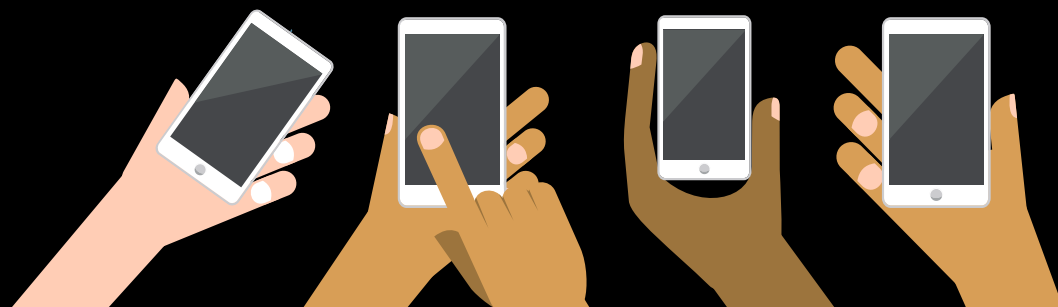
" The young demographic is clearly starting with mobile first. Mobile has been holding very steady and is still growing, but we're also seeing a lot of growth on connected devices. With voice assistant devices, OTTs and wearables, the consumption of music has been shifting massively away from the desktop computer to consumer electronic devices.

Chris Phillips
Chief Product Officer
Pandora

THEY HAVE *staggering buying power.*

$1.3 TRILLION

MILLENNIAL ANNUAL BUYING POWER IN THE U.S. ALONE[7]

" The Unreachables are highly sought after by our clients. 'Cord-cutters' or 'cord-nevers,' they represent trillions in spending power and growth segments for businesses worldwide.

Scott Hagedorn
CEO
Hearts & Science

FOR UNREACHABLES, *"television"* IS JUST ANOTHER SCREEN FOR STREAMING.

30 HOURS
OF VIDEO CONSUMPTION PER WEEK

MORE THAN HALF ON OTT DEVICES

ONLY 10 HOURS
—OR JUST ONE-THIRD—
ARE CAPTURED WITHIN TODAY'S
TODAY'S TV CURRENCY[8]

5 eMarketer, 2017   6 Nielsen, 2016   7 Forbes, 2017   8 Omnicom Media Group, 2017

> The biggest behavioral change we've seen is the platform shift. Today, we have about 77% of our viewing happening on 'living room' devices —connected TVs, Roku, Apple TV and gaming consoles.
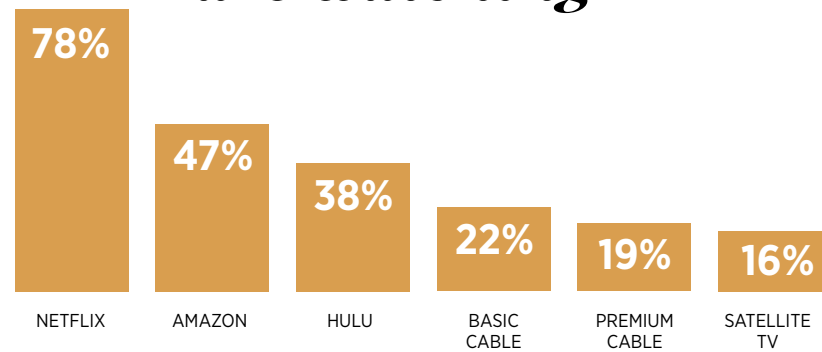
Julie De Traglia
Head of Ad Sales Research
Hulu

MONTHLY OTT HOURS VIEWED PER HH[11]

29	27	17	12
hulu	NETFLIX	YouTube	amazon prime video
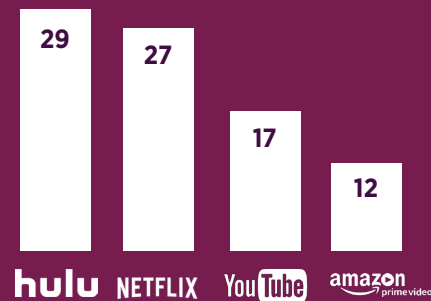
73%

OF MILLENNIALS ARE USING STREAMING SERVICES[9]

WHAT UNREACHABLES *are watching*[10]

NETFLIX	AMAZON	HULU	BASIC CABLE	PREMIUM CABLE	SATELLITE TV
78%	47%	38%	22%	19%	16%

Millennials and Gen X audiences are shifting video consumption to streaming services. These audiences comprise a large portion of overall viewers.

TOP 4 STREAMING SERVICES[11]

185M	128M	85M	34M
YouTube	NETFLIX	amazon prime video	hulu

> Millennials are attached to 'shows,' not a whole string of channels or a specific platform.

Clarissa Season
Global Head of Marketing Science
Annalect

IF WE DON'T FIND A WAY TO TRACK THE UNREACHABLES ACCURATELY AND CONSISTENTLY, *marketers may be missing out on a whole generation of consumers.*

"I'm in the target, but this looks like a foreign media plan to me"

Scott Hagedorn
CEO
Hearts & Science

> I had a planner come into my office about six months ago, and she was actually in the target of the campaign that she was working on. She used the industry standard planning tools and did all of the work as she should, then came in and said, "Hey, I'm in the target, but this looks like a foreign media plan to me, I don't watch any of these programs, I don't consume content this way.

Q & A

So What's the Deal with SDKs?

Software Development Kits (SDKs) are bits of code that are integrated into an app to pass data to a third party, for instance, a measurement company. They help provide important information to measurement platforms and to the marketers and agencies who use them, but they also require development resources to implement—and can damage the user experience when they "break."

We interviewed Pandora Chief Product Officer Chris Phillips to find out more about the future of SDKs and the delicate balance between consumer experience and facilitating measurement.

Q What is the challenge for today's measurement companies in measuring audiences on a cross-device platform like Pandora?

A With all the new technologies and desire for data, the ways of the past just aren't keeping up. Measurement firms need to evolve and to be more tech-forward to capture the data more succinctly so they can serve it back to the marketer. Panel-based methods just aren't going to be as solid as what you can get from having direct measurement that's certified.

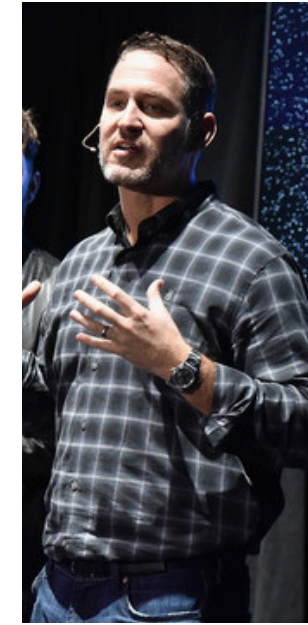### And that's where the SDK comes in. How many SDKs do you have on Pandora?

We currently have SDKs for Moat as well as for comScore, and we want to support even more. We're actively working with IAS and DoubleVerify as well, but it's really difficult as an individual measurement firm to try to get your SDK on every different publisher. You end up with folks using different methods of measurement, and it's hard to get an apples-to-apples comparison.

Does that lead to discrepancies?

The SDKs are a bit of a black box, and whenever you insert code from somebody else into your product, it can break things, or cause the product to be slow, or limit how quickly you can roll out new features. So while the SDKs have definitely improved, they've also created a lot of challenges. Sometimes the SDK grabs data that even the publisher doesn't have access to. So what you're finding is that you'll have a discrepancy between the publisher and what the measurement company is providing to the marketer.

Pandora has the largest digital music streaming audience in the U.S., and it's own logged-in user base. Does that make third-party measurement less important?

Marketers need measurement they can trust. Measurement for us isn't just relying on cookies or device I.D. but, rather, a logged-in user with real first-party data. We spend a lot of time making sure we can verify our audience, so that gives us an advantage. But we also help clients onboard and comingle their data with ours, as well as layer on third-party data, and we use all of it to develop a richer profile of who our users are and the segments marketers want to reach.

Chris Phillips, Chief Product Officer at Pandora

What's the risk to marketers who want to target "Unreachables" but don't have the data?

Marketers need to have solid measurement that they can count on, trust and have captured consistently—otherwise, it is very difficult to justify getting bigger budgets. Getting a marketing budget to go out and promote and spend requires you to have the confidence that you know who you are marketing to and the impact. The days where you could just splash media and try to measure some of it are gone. The expectations have just changed.

Where does measurement come in your product development timeline?

For every product we build, every feature, whether it's a new ad format or a consumer-facing feature to be used in the product, we're thinking about measurement upfront. It is not an afterthought.

So what is the future?

The future isn't necessarily to keep adding SDKs. Instead, we want to get to a transparent, open-source SDK that will work across all the different measurement providers and across all the publishers, platforms and devices to give consistency to the ad buyer. We've been partnering with the IAB Tech Lab, Google, IAS, Moat and DoubleVerify to come up with a common, shared consistent SDK. And if we can work on that and build it together, we can really help everyone in the industry. ◉

Q & A

MARRY THE ART & SCIENCE

To understand how brands are approaching the challenges of data, measurement, and marketing to increasingly elusive audiences, we went straight to the source. Below are edited excerpts of our interview with Ken Natori, President of apparel retailer Natori and Heidi Jessop Maund, Natori's Director of eCommerce.

THE NATORI BRAND HAS BEEN AROUND FOR DECADES, BUT IT'S CHANGED A LOT RECENTLY. CAN YOU TELL US ABOUT THAT EVOLUTION?

Ken: The company started 40 years ago as a sleepwear company but has transformed a lot over the last 10 years. Traditionally, we sold to high-end department stores, like Saks, Neiman-Marcus, Bloomingdale's and Nordstrom, and they told our brand story to the customer. Now, while department stores are still very important to us in terms of distribution, we've pivoted our focus so that we can go directly to the customer as well. We launched eCommerce nine years ago, our own retail store three years ago and have added new brands to expand our customer base.

AND SOME OF THOSE BRANDS, LIKE JOSIE, ARE TARGETED TO A YOUNGER DEMOGRAPHIC, INCLUDING MILLENNIALS AND GEN XERS. WHAT ARE THE DIFFERENCES YOU SEE WHEN MARKETING TO THOSE AUDIENCES?

Ken: We look at our ad spend breakdown every year, and we are certainly getting further away from print. We do more in digital, including an increasing spend on video. The pendulum keeps moving in that direction, and it doesn't look like it's slowing down.

In terms of the Millennials and Gen Xers, we actually face a unique problem: Every brand is trying to capture this audience, so it's a very competitive market, and they are also a very fickle customer without the same degree of brand loyalty. So you have two things working against you.

WHAT ROLE DOES DATA PLAY IN YOUR MARKETING STRATEGY?

Heidi: There is so much data and information, it's hard to connect the dots. We are a small company, so we don't have a lot of sophisticated measuring tools—we use Google Analytics. It's powerful—but we don't have a lot of resources helping us analyze, so it's really up to us to keep our finger on the pulse of what's going on and to understand the user path for how our customers find us. We do a lot of testing, and that's what's great about digital— we can test and optimize as we move along with our campaigns.

Ken: 10 years ago, I would have thought I would be poring through every piece of data and making sure that we were optimizing everything. But the reality is, we're competing against much bigger fish, and we have limited resources to execute all these campaigns. And there are many brands who are in the same situation as we are. The data can be hard to dig through, and a lot of brands don't have the resources to fully analyze and optimize everything.

Ken Natori
President
Natori
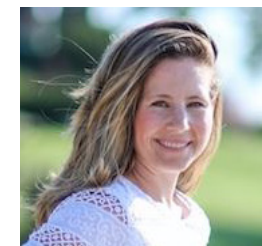
Heidi Jessop Maund
Director of eCommerce
Natori

OUR RESEARCH FOUND THAT MANY OF THE PLACES WHERE THESE AUDIENCES SPEND TIME—ESPECIALLY WITH VIDEO ON MOBILE DEVICES AND IN APP—WEREN'T CAPTURED BY TRADITIONAL PLANNING TOOLS. WOULD YOU MARKET ON A WEBSITE OR IN A MEDIA CHANNEL THAT DIDN'T HAVE TRACKING?

Ken: The path by which we come to final decisions on whether we'll do something or not isn't as data-driven as people might expect. If there's an opportunity presented to us where the ability to track the data isn't as strong as something else we've done, that doesn't mean we will say no to it. A lot of marketing is intuition for us, as well as for many companies of our size. Obviously, I wish there was perfect data tracking for every campaign we did, but the fact that there may not be doesn't prevent us from doing something if we feel it's the right fit.

Heidi: Exactly. You take the data you can get. You're never going to get the full picture. Data's become more sophisticated, and we need to correlate the meaning. Our job as marketers is to marry the art and the science in the digital world.

WHAT ADVICE WOULD YOU GIVE TO OTHER MARKETERS FACING THE SAME CHALLENGES AS NATORI?

Heidi: There is a lot of data out there. Pick what's important to you. Home in on what is going to impact your business and focus on that. ◉

"We Don't Want to Grade Our Own Homework"

"Addressability is really foundational for Hulu because it's the way we've always sold. We don't sell program-specifically, we sell horizontally, we sell audiences… At Hulu, identity management really comes down to the fact that we have first-party, subscriber-level data. But it's also important to us that it is verifiable from a third-party source. We don't want to grade our own homework, and we know that to be part of this ecosystem, we need third-party partners to say, "Yes that's a validated viewer."

Julie De Traglia
Head of Ad Sales Research
Hulu

Measuring the Big Four

Measurement varies widely across the top streaming services, and even a "Yes" often comes with caveats.

	YouTube	NETFLIX	amazon prime video	hulu
2017 USERS	185.9	128.0	85.3	34.7
AD SUPPORTED	YES	NO	NO	YES
CURRENT NIELSEN CURRENCY	NO[1]	NO	NO	YES[1]
NIELSEN TOTAL CONTENT RATINGS	YES	NO	NO	YES
NIELSEN STREAMING METER[2]	YES	YES	YES	YES
COMSCORE TOTAL HOME PANEL[3]	YES	YES	YES	YES

1 Measured only if content, break structure and commercials are identical to original linear TV airing, which would generally be restricted to live streamed TV content on those services. This is rarely the case as nearly all streaming video is consumed on demand with different ad loads. YouTube does not yet air content in this manner.

2 Experimental in-home meter, currently in 500 homes.

3 Experimental in-home meter, currently in 12,500 homes.

Why Is Digital Measurement SO COMPLEX?

An interview with Jonah Goodhart

We asked Jonah Goodhart, SVP of the Oracle Data Cloud and co-founder of analytics company Moat, which Oracle acquired earlier this year, about the challenges facing measurement companies today, how we arrived at this point and where it's all heading.

Below are edited excerpts from our interview.

We've spoken with a lot of publishers, brands and agencies who say that measurement hasn't evolved quickly enough to keep up with shifting consumer behaviors. How do you think we got here?

I read a report that said 75% of all internet activity in 2017 will be on mobile devices. Think about that for a second: Three-quarters of all consumption of the internet will be on your phone—a device that barely even existed, in terms of internet usage, just 10 years ago.

The question for me is not specific to measurement. It's the fact that, in 10 years, we've taken literally billions of people and transported them to these new devices and these new environments, and it wasn't sketched out, it wasn't planned. It wasn't as though people sat down like they would plan a city and said, "Here's how it's going to work, here's how everything is going to function." The landscape evolved over time, and so there are natural challenges that exist, including in mobile, but they're surmountable. And we will overcome them as an industry.

What makes digital video measurement so uniquely complicated?

A lot has changed in the last five or 10 years when it comes to measurement. If you look at television, on which a lot of traditional measurement was based, it's consistent. You have 15- and 30-second ads that take up the entire screen, that have audio, and that look the same, whether it's on one network or another.

In digital, a video ad may or may not have audio. A video ad may or may not take up even half the screen or a third of the screen. A video ad might start playing automatically, or you might have to click to play it, or you might have to watch it in order to get to your content.

And so all of those dynamics are really different and they change from platform to platform in digital, so we have a very new set of issues.

And what do these issues mean for marketers?

The questions are no longer just, 'Did my ad run? Did it play? How many times? Did it reach the right people?' The questions become, 'Did somebody actually see it? And did they pay attention?' And those questions are really our focus at Moat: How do we understand consumer attention and how do we help brands ultimately drive more actions by grabbing people's attention in a positive way.

Jonah Goodhart, SVP, Oracle Data Cloud

Why do you think measurement is so important to our industry?

We can't improve if we don't measure. That's true for everything. And so measurement is critical to the decisions that we make. It's critical to what we invest in and to our understanding of what's working and what's not working. Ultimately, measurement is absolutely key to driving success.

What is your advice to other measurement companies? Or to the partners trying to help brands reach these consumers across platforms?

Keep it simple. Focus on delivering for the client. At a very basic level, every single marketer wants to reach people, get their attention and drive an action. That's it. It's pretty hard to do when we're all distracted and we're all on multiple devices, but that's the goal.

We are in the early innings of cross-platform measurement. It's the beginning, but we need to figure it out. We need to figure out how to address the fact that I may watch something on my connected TV at home, then walk away with my mobile device and go outside and see an ad for the same brand, then see a different ad for that same brand on my computer on that night. We need to figure out how to piece that journey together in a thoughtful way—in a way that is respectful of consumer privacy, and in a way that lets marketers get smarter.

The good news is that, as marketers get smarter about how to reach people, their ads become more relevant, more interesting, and the value that a consumer gets from being exposed to advertising increases. And so there's an upside to figuring out how to measure more effectively, and how to tell stories more effectively, not just to the advertiser and the publisher, but also to the consumers themselves. ◎

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Forces of Change

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Toward
AN OPEN SDK

When we asked industry leaders how to solve the challenge of the Unreachables, two distinct paths forward emerged: helping to accelerate innovation by traditional measurement companies and developing the Holy Grail of mobile measurement—the universal, open SDK.

Julie De Traglia
Head of Ad Sales Research
Hulu

"The dream of having this total audience or consistency across all platforms is probably impossible to get to because measurements will never keep up with the consumer changes. **There will always be some new device or platform that pops up.** But we have to be careful not to put the perfect ahead of the good. I don't envy the job of companies like Nielsen and Kantar, but we work with them because we know that it's important to be part of that ecosystem and to have third-party validation. It's never going to be 100%, but through collaboration, it's probably something we can create to get a better understanding of audiences and to better buy media, which is really what the goal is."

Chris Phillips
Chief Product Officer
Pandora

"Ideally though, all the publishers get to a spot where they have **solid, consistent measurement** through an open-source SDK that **works across partners, platforms and devices.** In the meantime, marketers really have to make sure that their spend goes across places where they have high trust and confidence...with custom measurement tools. It becomes very difficult for a marketer to know what's working and what's not."

"**I think the challenge is both technical and philosophical.** Technically, there are limited opportunities to install SDKs into apps, and there isn't currently an open SDK in the market that everyone can use, so if you're an app maker, or you're a content distributor over apps, you have a limited number of players that you can work with. Philosophically, most of the industry standard data providers actually make their money from TV networks—nearly 75% of the total revenue—so there may be less interest in telling a story that disincentivizes those buys. **As an industry, we need to standardize an open SDK to make it work for mobile and OTT.** We're recalibrating our models to overcompensate for mobile and in app consumption, while we help drive the open SDK initiative and try to get all the publishers on board and help bring the technology to fruition."

Scott Hagedorn
CEO
Hearts & Science

IN CLOSING

REACHING
The Unreachables

A MARKETER'S CHECKLIST

As the media landscape continues to evolve and expand, marketers, agencies, measurement firms and media platforms require new and dependable capabilities to understand how to reach and connect with audiences in a meaningful way. This is especially true when it comes to engaging the sizable, desirable audiences who have moved away from traditionally measured media.

The good news is, the Unreachables aren't as elusive as they may seem.

How can marketers address the Unreachable challenge and use it as an opportunity? How can marketers update their approaches in light of new media realities that will continue to evolve? We offer the following suggestions:

1 UNDERSTAND YOUR "UNREACHABLE" AUDIENCE

- How much of your intended audience is "unreachable" by the current media measures you are using?
- What characterizes the relevant groups within this audience set, both in terms of traditional and emerging media usage, as well as the role each media platform plays in their lives?

2 CARVE OUT TIME AND BUDGET TO LEARN HOW NEW MEDIA PLATFORMS PERFORM FOR YOU

- Have you assessed the current and near-term risks associated with staying the course with current measurement practices?
- Have you carved out resources for rigorous experimentation in order to continuously learn how best to effectively allocate resources over the short and longer term?

3 USE YOUR LEVERAGE TO SPEED ADOPTION OF OPEN AND STANDARDIZED SDKS (SOFTWARE DEVELOPMENT KITS)

- Work with your top agency and publisher partners to standardize the SDKs being used across properties, platforms and campaigns.
- Join efforts to help shape future solutions and ensure they reflect marketer needs, such as the IAB's Measurement Perspective Working Group.

4 GET YOUR OWN DATA HOUSE IN ORDER

- Have you conducted a corporatewide audit of data security and privacy policy guidelines?
- Are you able to capture identity-based data across all of your touch points, beyond just media buys (e.g., customer service, retail)?
- Are you able to customize and sequence offerings based on new insights into the Unreachables' journey, understanding that there isn't just one "customer journey map" per brand or even per product?

5 SEE YOUR CONTENT FROM YOUR UNREACHABLE AUDIENCE'S PERSPECTIVE

- Are you creating content that enhances the Unreachables' experience?
- Is your content consistent and synergistic across all of the touch points where Unreachables will find you?

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