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FRAME THE DEBATE

BUSINESS BRIEFING

Fulfilling the Promise of
Addressable TV Advertising
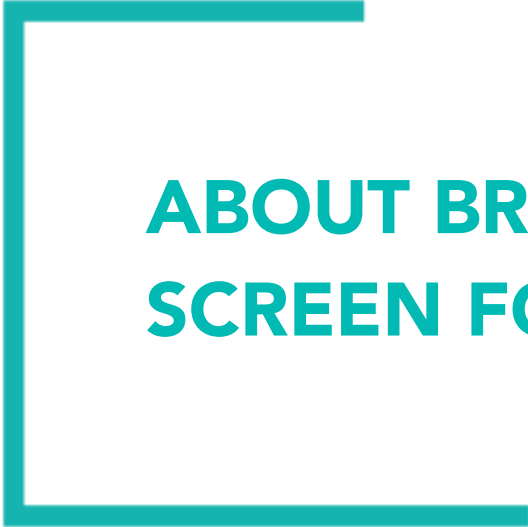July 2020

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ABOUT BRITISH SCREEN FORUM

British Screen Forum is where the best informed and most influential people in the UK screen sectors convene to interrogate issues of importance and influence policy and the thinking around policy.

The Forum provides a unique and trusted space for key players from the screen sectors to come together to debate the implications of the evolving landscape and the policy and regulatory environment, and to gain unrivalled insight into emerging themes and innovative technologies.

British Screen Forum has authority and impact – not only as a result of the influence, status and credibility of its members, the unrivalled quality of its insight and the high level access it provides to decision-makers, but also because it values and includes individuals, organisations and bodies who seek to frame the debate for the future of the UK screen sectors.

This analysis is published as part of our Business Briefing series, and is based on a presentation made to Members by the author at an Insight Event on 2 July 2020.

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INTRODUCTION

Although the underlying technological concept has a history that can be traced back to at least the 1990s, addressable TV advertising has arguably not yet fulfilled its potential. However, there is a confluence of market dynamics that strongly suggests its 'time to shine' has now arrived. For this reason, British Screen Forum has decided to take a deeper look at the current status of addressable TV and the issues raised by its future development.

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MARKET CONTEXT

Traditional broadcast TV has proven to be a pretty robust performer during the difficult period of COVID-19-induced lockdown. Compared to the same time in 2019, overall viewing of individuals was up 21 per cent. Even the 'harder-to-reach' 16-34-year-old demographic increased their broadcast viewing time 18 per cent, while kids' viewing was up 14 per cent.[1]

This uplift obviously occurred under unusual circumstances with a more 'captive' audience than usual and far fewer competing outdoor attractions. However, whilst broadcast demonstrated its resilience in attracting viewing attention, this sadly did not translate into a corresponding uplift in TV advertising spend. Indeed, many advertisers dramatically cut their spend in response to the pandemic.

For 2020 as a whole, WPP media agency GroupM now forecasts advertising spend on UK linear TV channels will fall 17 per cent. This compares to a far less eye-catching drop of 8 per cent for 'digital' ad spending.[2] The Advertising Association (AA) forecasts a slightly more optimistic decline of 14.5 per cent for linear TV in 2020, but also expects a 13.2 per cent recovery growth rate in 2021.[3] Interestingly, the AA believes Advertising-supported Video-on-Demand (AVoD) – which is driven by 'addressable' - will be the single most robust advertising medium this year, recording a decline of just 1.2 per cent. This compares to forecast declines of 7.9 per cent for online display advertising and 12.3 per cent for spend on online search ads.

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[1] BARB/Thinkbox weeks 13-19 2020 versus weeks 13-19 2019 (live + viewing on same day as live TV set viewing)
[2] This year, next year: UK mid-year forecast – Brian Wieser, June 2020
[3] UK adspend down 39% in Q2 – AA/WARC, 30 July 2020

In an increasingly fragmented media landscape, broadcast has an ever-growing number of competitors for attention. For British adults, broadcast still commands the single largest share of all time-with-media (34 per cent), compared to 28 per cent for all Internet browsing and social media. By comparison, consumption of Subscription Video-on-demand (SVOD) and all other online video totals 6 per cent.[4]

For younger people, it has become a 'true-ism' that broadcast has become less and less important. However, for 16-34-year-olds, time spent watching television still matches that spent on general Internet browsing and social media – each accounting for 19 per cent of total 'media time'. This younger demographic spends more of their time than the average adult viewing online video services (12 per cent).[5]

[4] TouchPoints 2019 – IPA
[5] TouchPoints 2019 – IPA

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THE MASS MARKET 'UNIQUE SELLING POINT' OF BROADCAST TV

Nevertheless, there is little doubt that broadcast TV is still unrivalled in delivering a simultaneous mass market commercial audience. For advertisers, the ability to reach millions of viewers with a single message remains an extremely attractive proposition. ITV's *I'm A Celebrity Get Me Out of Here*, for example, was able to attract over 13 million viewers in November 2019.
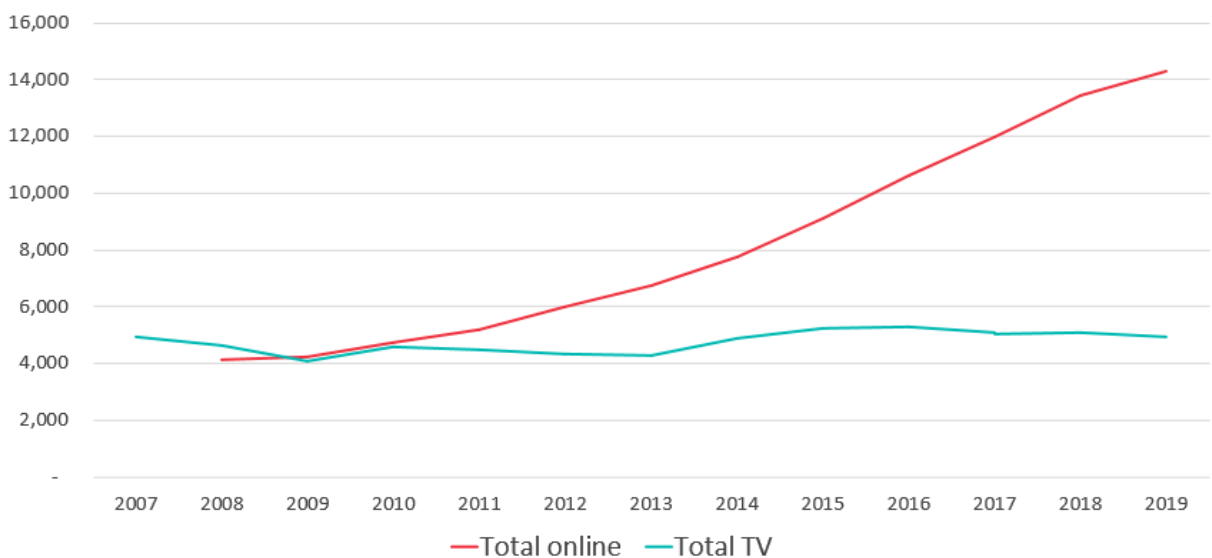
Critics of the classic broadcast commercial model sometimes somewhat disparagingly term it a 'spray and pray' advertising strategy, but there is no doubt that it can still be incredibly effective. The down side of the model is really summed up by the marketing pioneer John Wanamaker, who said 'Half the money I spend on advertising is wasted; the trouble is I don't know which half.' That famous quote concisely sums up the challenge of efficiency in advertising, which is precisely the challenge that proponents of online advertising have always promised to address by delivering targeted ads to selected users with a return path that promised confirmation of viewer engagement.

It is probably fair to say that the TV industry has long been somewhat envious of this 'efficiency' potential promised by online advertising. Consequently, the drive to make TV addressable and data-driven can partly be seen as an attempt to level the 'playing field' with online competitors.

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ONLINE 'EFFICIENCY' TRANSLATES INTO ADVERTISER SPEND

The perceived benefits of online over legacy advertising models have resulted in remarkable commercial success. Over the last 10 years, total UK spending on all forms of online advertising has rapidly overtaken advertiser expenditure on commercial TV. Indeed, online spend was almost three times total TV expenditure in 2019 – and that gap will only expand this year.
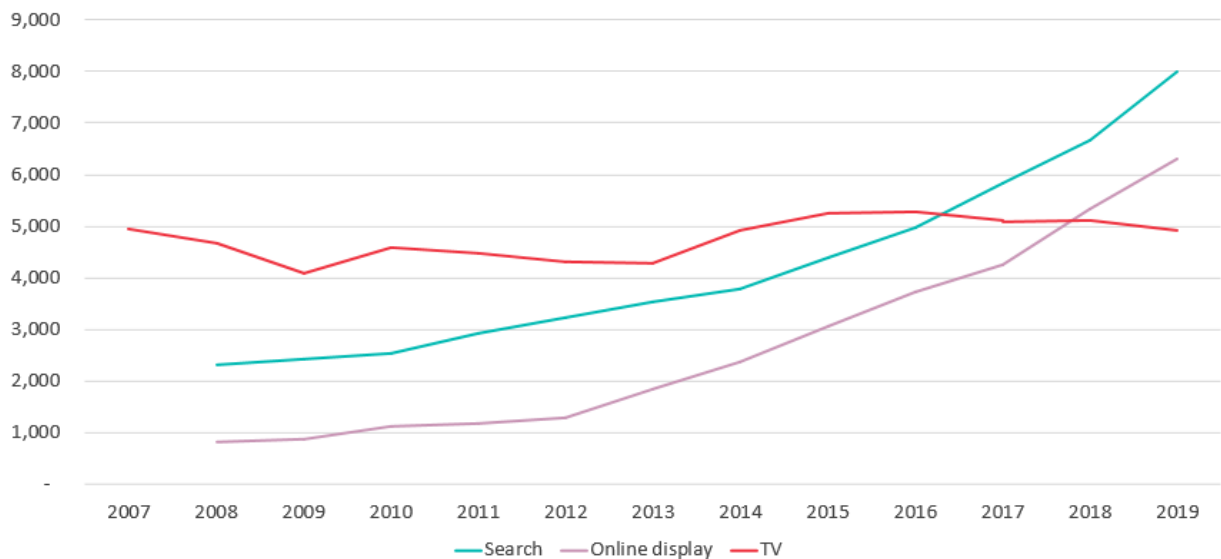
UK ADVERTISING EXPENDITURE (£M)

Source: AA/WARC, IAB UK, Ofcom, BK analysis

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Dividing the online spend into the two main categories of 'search' and 'display' shows how the Google-driven search element overtook television spend on its own about four years ago. And even the smaller online display advertising segment is now a larger market than TV.
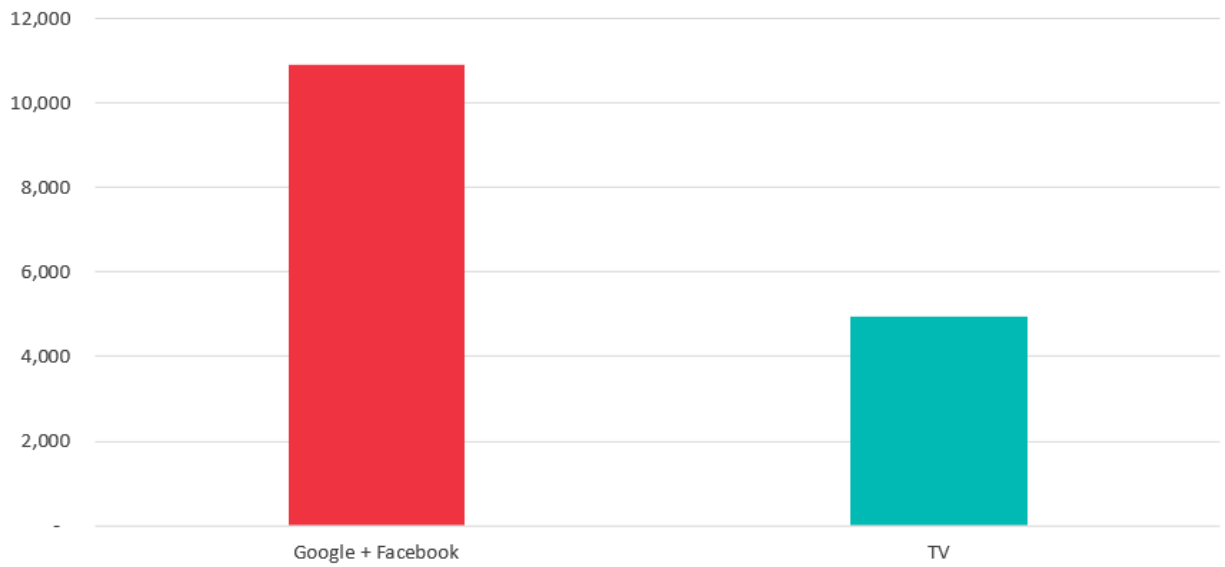
UK ADVERTISING EXPENDITURE (£M)

Source: AA/WARC, IAB UK, Ofcom, BK analysis

Google and Facebook alone generated more than double all the ad revenue generated by broadcasters last year and accounted for about 80 per cent of all online spend. That strong market position has not gone unnoticed by the Competition and Markets Authority, which on 1 July 2020 proposed a new Digital Markets Unit to enforce a stronger regulatory regime, particularly aimed at Google and Facebook. They also formally launched a so-called Digital Markets Taskforce, alongside Ofcom and the Information Commissioner's Office (ICO), which will 'advise government on how a new regulatory regime for digital markets should be designed.'[6]

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[6] New regime needed to take on tech giants – press release issued by CMA, 1 July 2020

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2019 UK ADVERTISING REVENUE (£M)

Source: AA/WARC, CMA, BK analysis

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THE 'DARK SIDE' OF ONLINE ADVERTISING

Underlying the growth of online advertising is a bewildering array of complex technology and associated solutions providers that is neatly abbreviated in the short-hand term 'AdTech'. The complexity of the AdTech landscape is well illustrated by the famous chart that LUMA Partners have been generating for many years that allocates key players within their relevant parts of the value chain.[7]

The AdTech supply chain has become increasingly automated or, so-called 'programmatic,' in the way that it is run, and this has led to accusations that there are dangerous levels of opacity. A recent study by PwC for the Incorporated Society of British Advertisers (ISBA) found that a selected sample of 15 advertisers had no less than 300 distinct supply chains involved in reaching 12 different 'publishers' or online outlets for their advertising.[8] Furthermore, when they looked into the underlying economics of this supply chain, it was discovered that some of the money apparently goes 'missing' or effectively cannot be traced. After deducting the fees for five different categories of agency and AdTech vendor in the supply chain, the study revealed an 'unknown delta' of 15 per cent that they were unable to trace. Consequently, the publisher or media company finally received only 51 per cent of the sum originally spent by the advertiser. The study concluded that there is urgent need to address this lack of supply chain transparency.

The business of online advertising has, of course, been subject to many other well-publicised criticisms. These include the accusation of mis-

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[7] See https://lumapartners.com/content/lumascapes/display-ad-tech-lumascape
[8] ISBA Programmatic Supply Chain Transparency Study – see
https://www.isba.org.uk/media/2424/executive-summary-programmatic-supply-chain-transparency-study.pdf

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handling personal data when operating 'real-time bidding' processes, which was subject to an extensive investigation by the ICO.[9]

Other areas of concern include fraud, which typically involves the use of fake websites or 'bots' programmed to mimic human traffic, and the issue of brand safety. A number of large companies have found their ads appearing in 'unwholesome' parts of the online world or alongside questionable social media messages that they would prefer not to be associated with.

To a large extent, the pitch for addressable TV advertising is to counter the downside perceptions of online advertising. It is intended to offer many of the pros of online, but without the cons referred to above. ITV, for example, promotes advertising on its ITV Hub catch-up service in terms of delivering 'the best of both worlds – mass simultaneous reach and addressable targeted advertising at scale.' It lists a number of elements carefully positioned to align with criticisms, such as 'viewed by humans' and 'brand safe.'

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[9] See https://ico.org.uk/about-the-ico/news-and-events/blog-adtech-the-reform-of-real-time-bidding-has-started/

WHAT IS ADDRESSABLE TV ADVERTISING?

Simply put, there are four key features associated with making TV addressable:

1. Instead of broadcasting the same advertisement to all viewers, addressability provides the option of selecting different ads for chosen viewers.

2. It offers the possibility of targeting audiences based on specific profiles.

3. There is the potential of enabling real-time interaction with viewers together with insights on who has viewed which advertisement.

4. The promise of a more efficient means of planning and buying those ads in the first place.

The architecture for delivering addressable TV advertising consists of three elements that are a mix of horizontal and vertical platforms. First, there is the requirement for a consumer video platform that has both a return path capability and the technology required for addressability. In practice, a 'return path' usually just means the device is connected to the Internet. Examples of suitable devices include pay TV set-top boxes (e.g. Sky, Virgin Media, and BT), smart TV sets, tablets and smartphones.

The second key requirement for addressable TV advertising is data. It is critical that an addressable ad provider can capture and process data about its own viewers – so-called 'first-party' data – and potentially combine this with third-party data sources. In practice, the collection of first-party data requires a broadcaster to mandate registration before using

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a video service or to operate behind a subscription 'pay wall' as pay TV platforms have always done. (Data strategies are discussed further later in this paper.)

The third component to addressable TV architecture is a more verticalized platform that might typically combine a data management functionality with some AdTech optimised for the TV environment. This should make it possible to process audience data into segments that are most meaningful to the commercial imperatives of a specific advertiser and then enable the delivery of commercial messages that are fine-tuned to the profile of that particular segment.

Addressable advertisements can be conveyed both via live linear TV and also via on-demand. The latter is, of course, closer to the online world and therefore technically easier to accomplish. Inserting a specially selected ad to be delivered on a targeted basis can be done centrally or it can be done locally inside the memory of the consumer device itself. The former is known as server-side ad-insertion, often abbreviated to SSAI.

Server-side ad insertion is primarily used to switch ads within a VoD stream but can also applied to live streaming whereby linear simulcasts of broadcast programming are transmitted over the internet. Local insertion involves ads being 'pushed' in advance into the memory of the set-top box and then swapped on cue to replace a broadcast ad at exactly the right time so the viewer detects no delay or interruption. This technique of local ad insertion is the only way to achieve addressability for live linear broadcast TV and has been pioneered by Sky with its AdSmart platform.

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ADDRESSABLE INNOVATION AT SKY

Sky AdSmart was first launched in 2014 and is widely acknowledged to be one of the foundational innovations in the addressable TV space. It was originally designed to allow local insertion of ads to set-top boxes before they had broadband Internet connections to ease the process. This meant that clever ways had to be devised to push ads to the set-top box via the broadcast signal rather than download them via the Internet, as would be the obvious mechanism today.

For most of its history, AdSmart was only deployed on Sky's own set-top boxes. However, a 2017 deal with Virgin Media paved the way to a roll-out on the UK's other major pay TV platform in June 2019. Whilst the technology was initially developed to solve the challenge of making linear broadcast addressable, Sky has also introduced AdSmart capability to its on-demand and catch-up programming.

Despite significant headwinds, AdSmart has made considerable progress over the years, with more than 17,000 different campaigns delivered. Sky has had particular success enticing companies that have never before advertised on TV to use AdSmart and more than 1,000 have become TV advertisers for the first time. Whilst many of these 'first-timers' are likely smaller firms exploiting the capability of AdSmart to target specific geographically defined customer groups, Sky also boasts that 75 of the top 100 UK advertisers have run addressable campaigns using the solution.

Deals with ViacomCBS-owned Channel 5 and NBCUniversal (now Sky's parent), have extended the reach of AdSmart beyond Sky's own line-up to over 100 channels in total. In 2019, Channel 4 also agreed to use AdSmart for addressability on its linear broadcast channels, but that has not yet been implemented. Despite many discussions over the years, ITV has not

yet agreed to include its channels within the AdSmart platform. However, because addressable advertising has now become a key plank of ITV strategy, that could change.

CHANNEL 4 AND ITV: CONTRASTING STRATEGIES

Like Sky, Channel 4 has had an impressive history of innovation in the addressable advertising space – and, indeed, has pioneered a wide range of new technologies. Back in November 2006, it was one of the first broadcasters anywhere in the world to introduce an online on-demand video service. What was then named 4OD (and now branded All4), was actually launched more than a year before the BBC debuted iPlayer and even before Netflix started streaming in the US.

Within the advanced advertising domain specifically, Channel 4 was early to understand the value of first-party data and consequently became the first broadcaster to roll out any kind of registration requirement for viewers of its on-demand service. It also pioneered fully personalised ads, including the option to address a viewer by name. More recently, Channel 4 led the way with a programmatic advertising platform for TV, was first to insert addressable ads into a live stream, and first to make all of the advertising inventory on its on-demand proposition, All 4, 100 per cent addressable.

Rather than a move to full automation of buying, Channel 4 focused its initial programmatic efforts on allowing agencies to purchase advertising inventory from All4 via a choice of so-called Demand-Side Platforms or DSPs. This year, the broadcaster has introduced a Programmatic Guaranteed proposition that enables purchase of All4 advertising space on a fixed cost per thousand (CPM) basis, which helps agencies seamlessly select the Channel 4 proposition within a wider range of different online video advertising outlets. Further moves towards adoption of more automated AdTech solutions have been delayed by the impact of the pandemic.

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By contrast, ITV has largely been playing catch-up in the addressable advertising space, but recently under Carolyn McCall's leadership tenure it has become a very high strategic priority for the company. This is best illustrated by the roll-out this year of a state-of-the-art programmatic TV advertising platform named Planet V. Claimed to be a unique proposition within the TV industry, this is an ambitious venture that is reckoned to combine all the AdTech elements required in a single platform: Demand-Side Platform (DSP), Supply-Side Platform (SSP), Data Management Platform (DMP) and ad server. The underlying technology for Planet V was licensed from a US company called Amobee, which in turn acquired it from another defunct company called Videology.
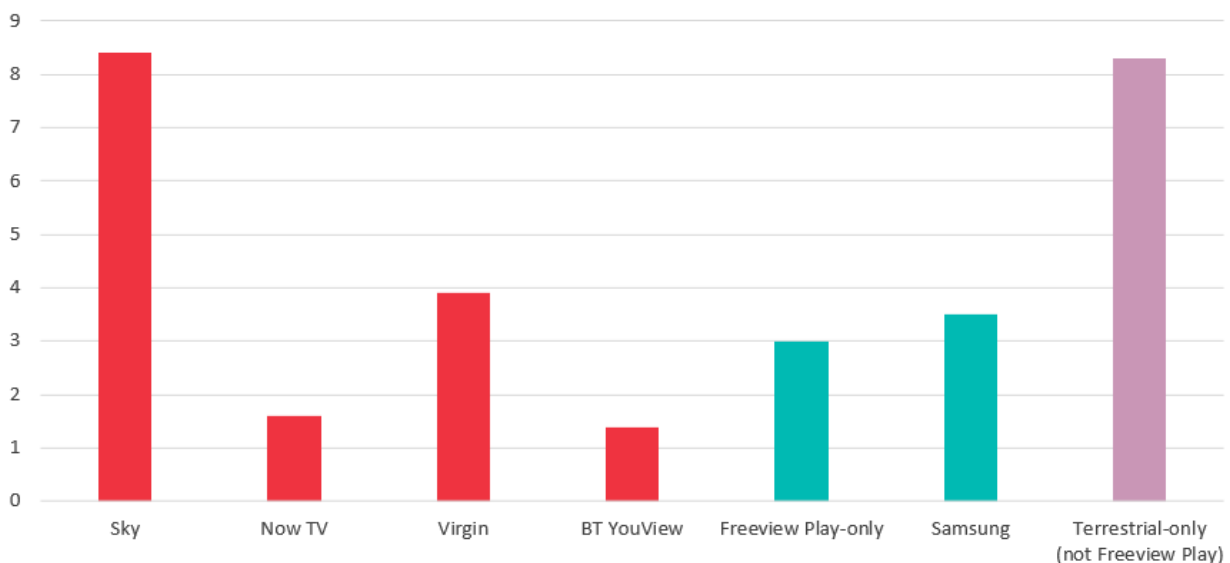
By July 2020, around 35 per cent of ITV's VoD advertising inventory was delivered through Planet V with a plan to expand this to 100 per cent by the end of the year. Indeed, by then, it is intended that Planet V will be the only way to buy advertising space on the ITV Hub VoD platform. According to ITV, a buyer can use the Planet V interface to plan, buy, activate, approve, manage creative workflow, manage campaigns, and handle reporting, as well as utilising the built-in SSP to determine the most appropriate and accurate optimisation for those campaigns. Whilst the commercial broadcaster expects most major agencies to be using Planet V by the end of 2020, perhaps more interesting is the clear ambition to encourage other broadcasters, VoD services and publishers to join ITV in using the platform.

HOW MANY UK HOUSEHOLDS CAN RECEIVE ADDRESSABLE TV ADS?

Overall, around 70 per cent of TV households in the UK can potentially receive some kind of addressable advertising on their primary TV set, with a mix of linear and streaming-only flavours of addressable. The Sky AdSmart platform has the largest universe of approximately 14m homes, with the combination of Sky itself and Virgin Media plus the expected roll-out of AdSmart on the Now TV platform – and this means there are about twice as many households equipped to receive addressable via linear broadcast as the number that can be targeted with on-demand-only addressability.
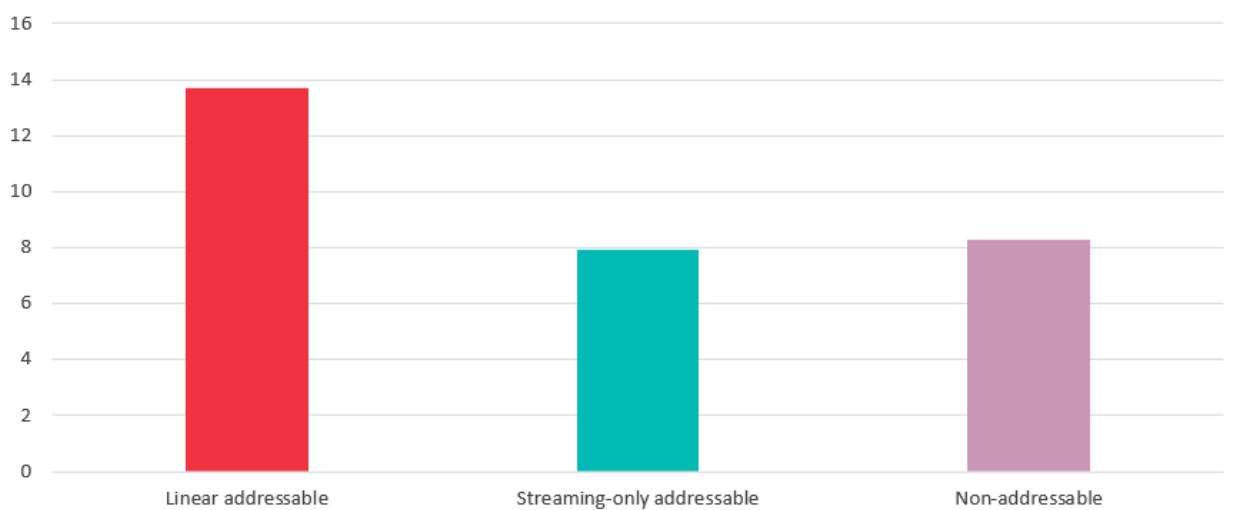
PLATFORM HOUSEHOLDS (M)

Source: BK analysis of BARB, Freeview, Samsung

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The hybrid digital terrestrial/broadband platform YouView was also designed to be upgradable to enable Server-Side Ad Insertion on linear and on-demand services transmitted over the Internet. Although this capability was first demonstrated over 2 years ago, it is only later this year that the necessary software is expected to be downloaded to BT YouView set-top boxes to allow technical trials to be carried out with broadcasters. If that goes well, the plan is to launch the proposition commercially in 2021.

ADDRESSABLE V NON-ADDRESSABLE HOUSEHOLDS (M)

Source: BK analysis of BARB, Freeview, Samsung

The most used terrestrial TV platform is Freeview and the latest version of that, Freeview Play, includes a broadband return path to allow reception of streaming alongside traditional broadcast. This technology is based on a widely-adopted set of technical specifications called HbbTV. Whilst some commercial broadcasters in mainland Europe have successfully employed HbbTV-based solutions to deliver addressable advertising within linear broadcasts, the differing technical parameters in the UK mean that has been decreed impractical by local broadcasters. Consequently, linear addressable capability will not be available via Freeview for several years until receivers become available based on the next generation of HbbTV. In the meantime, Freeview Play does allow the possibility of on-demand addressability so services like ITV Hub and All4 can deliver targeted ads via the built-in broadband connection.

By far the largest consumer electronics vendor that does not support the Freeview Play standard is Samsung. Instead, Samsung has pursued its own

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connected device strategy and has the largest installed base of smart TVs in the UK – about 5.5m. Of this total, the owners of 3.5m Samsung smart TVs have consented to allow detailed data about their viewing habits to be collected via a system of so-called Automatic Content Recognition (ACR). Alongside other streaming apps, Samsung itself operates a VoD service via an app on the TVs called Samsung TV Plus and ads within that service are sold on an addressable basis with the help of some AdTech partners.

Other vendors of connected device products are also pursuing addressable advertising opportunities and probably most notable amongst these is the US firm Roku. Globally, Roku has over 43m active accounts (households with a registered streaming device) and collects an average annual advertising revenue from each of around $25.
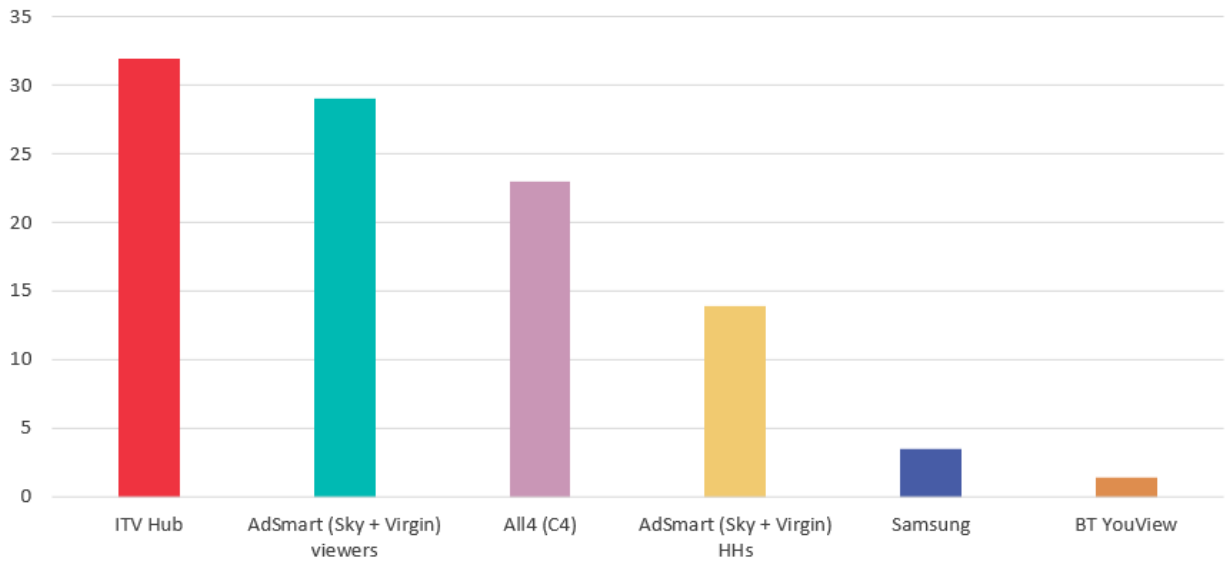
IT'S ALL ABOUT THE DATA

As already highlighted, data is a key element to successful implementation of addressable TV advertising whilst always trying to prioritise protection of consumer privacy. It starts with first-party data gathered by the broadcaster itself. Collection of subscriber data has always been fundamental to the business of pay TV broadcasters like Sky and Virgin Media, but establishing a direct relationship with viewers has been a far greater leap for free-to-air commercial broadcasters like Channel 4, Channel 5 and ITV. The development of catch-up streaming services has provided the perfect opportunity to establish that 'direct-to-consumer' engagement that had never previously been important.

Channel 4 was first to make registration mandatory for use of the All4 VoD service and now has in excess of 23m sign-ups. Coming from behind, ITV has persuaded an impressive 32.2m people to register for use of the Hub streaming proposition. That compares to about 29m individuals within AdSmart homes, but Sky and Virgin typically hold their primary data at the subscribing household level rather than the individual sign-up required for broadcaster catch-up – so arguably the more relevant point of comparison is the 14m subscribers within AdSmart-enabled homes.
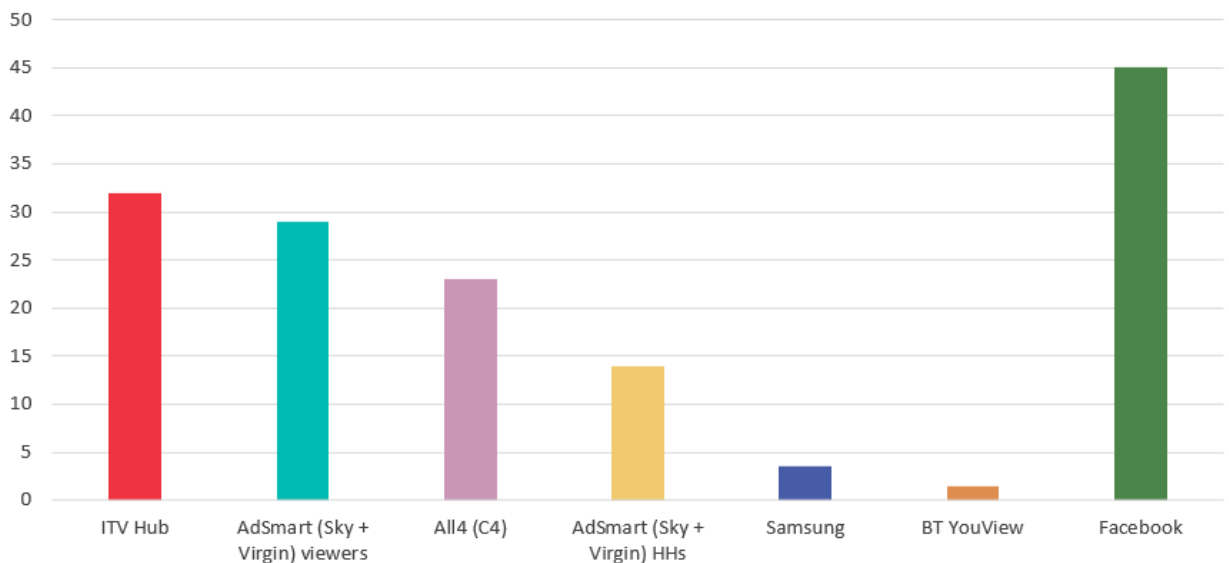
1ST PARTY DATABASES (M)

Source: BK analysis of BARB & company data

Whilst these growing broadcaster databases clearly have considerable value within the UK market context, it is worth noting that they are still overshadowed by the scale of the first-party datasets controlled by the online advertising giants. Within the UK alone, Facebook has about 14m *more* accounts than ITV does for ITV Hub and globally the social media leader has some 2.4bn members available for targeted ad campaigns.

1ST PARTY DATABASES (M)

Source: BK analysis of BARB & company data

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To make first-party data more valuable for advertisers, broadcasters can segment their audiences based on relevant marketing-driven attributes. Common ways this can be done is by conducting original primary consumer research that can be applied to the first-party customer data or by applying so-called 'look-alike' match modelling with third-party data from a specialist commercial data supplier such as Experian.

Through AdSmart, Sky offers advertisers the opportunity to select a target audience based on a choice of around 4,500 different attributes, including factors like 'lifestage', home ownership, affluence, early technology adoption, car ownership, age of children, and precise geographical location. Sky also undertakes considerable additional research to better understand the impact of the addressable ads in terms of attribution and purchase.

A next phase of this process is the potential to enable advertisers and agencies to combine their own data in the addressable advertising planning process. Channel 4 recently announced a solution called Brandmatch that allows advertisers to select their own target audiences via a dashboard by injecting their own customer data to find matches against the All4 database. It has been working with a start-up called Infosum, which allows the data matching process to occur securely without the information ever leaving the respective owners. This decentralised and federated approach effectively rivals some of the data matching capabilities offered by leading online platforms like Google and Facebook, although arguably with tighter safeguarding of data.
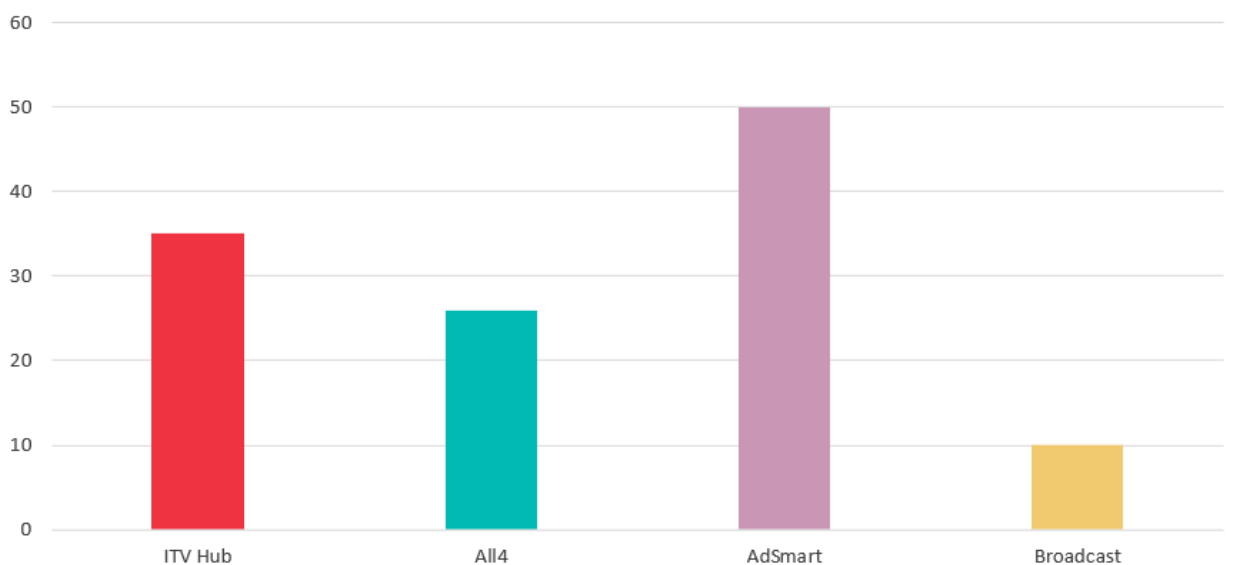
ITV has also been impressed by the Infosum technology and recently announced it would partner to introduce a similar data-matching proposition. Indeed, ITV has gone even further in making a £1m investment as part of a $15m Series A funding round raised by Infosum.

PRICING AND BUSINESS MODELS

Because of its claimed efficiency and targeting advantages, addressable is pitched by its proponents at a much higher value than traditional linear broadcast advertising. The 'cost per thousand' for an AdSmart commercial might typically be as much as five times the price of a legacy broadcast spot, but then the advertiser may be able to reach its marketing objectives by delivering to a far smaller set of carefully selected viewers and therefore spend less overall. Indeed, there is an argument that addressable offers a low-cost route into TV advertising for smaller advertisers who could embark on an AdSmart campaign for as little as £3,000.

LOWER-END COST PER THOUSAND (£)

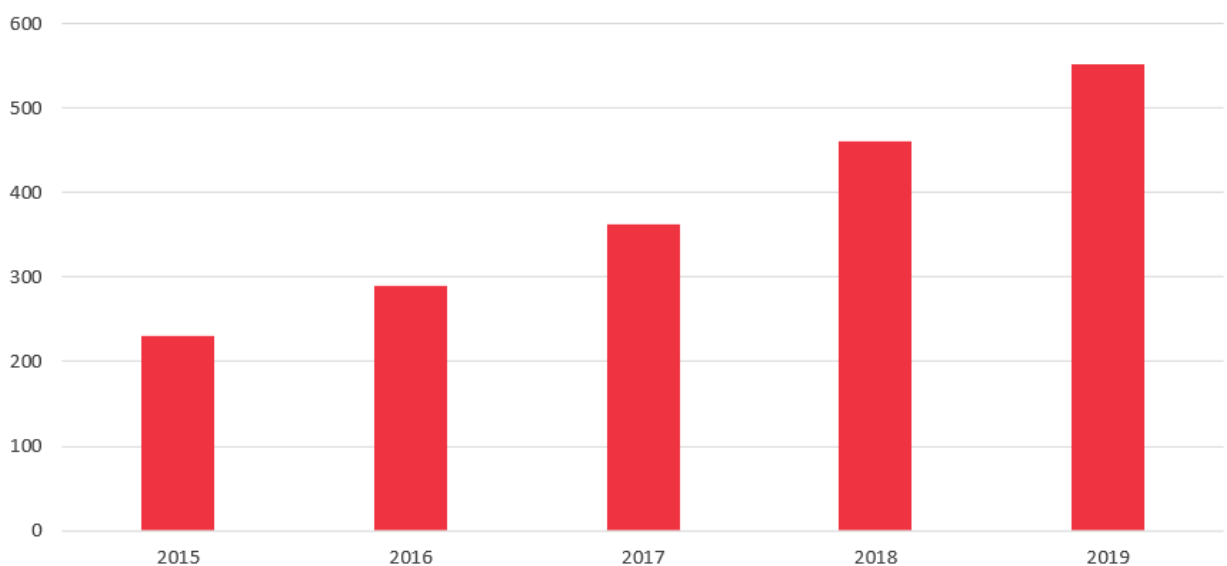Source: BK research

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Nevertheless, the perceived high cost of addressable does not always go down well with advertisers. Matthew Gaunt, Chief Marketing Officer at DIY retailer Wickes, stated that 'the economics of something like AdSmart don't work for us yet – the return-on-investment doesn't stack up. […] Cost per customer acquisition is worse than Google or Facebook.'[10]

Similarly, Sam Taylor, Head of Commercial Marketing at insurance company Direct Line explained that 'wastage is good for us because insurance is a ubiquitous product. […] AdSmart does work and drive incremental sales, but it is still more cost effective to buy broadcast TV.'[11]

Whilst these statements were made a few years back, there is certainly still a widespread sense in which advertisers do not believe addressable is suitable for all kinds of products. Mass market brands, in particular, still have a strong allegiance to the 'blunter' instrument offered by the unrivalled reach of conventional broadcast advertising. That said, the fact that 75 of the top 100 UK advertisers have at least tried AdSmart and other addressable options implies there is growing market acceptance.

This is certainly borne out by the growing revenue contribution made by addressable forms of TV advertising. Spending on all addressable TV advertising last year exceeded 10 per cent of the whole TV ad market for the first time.
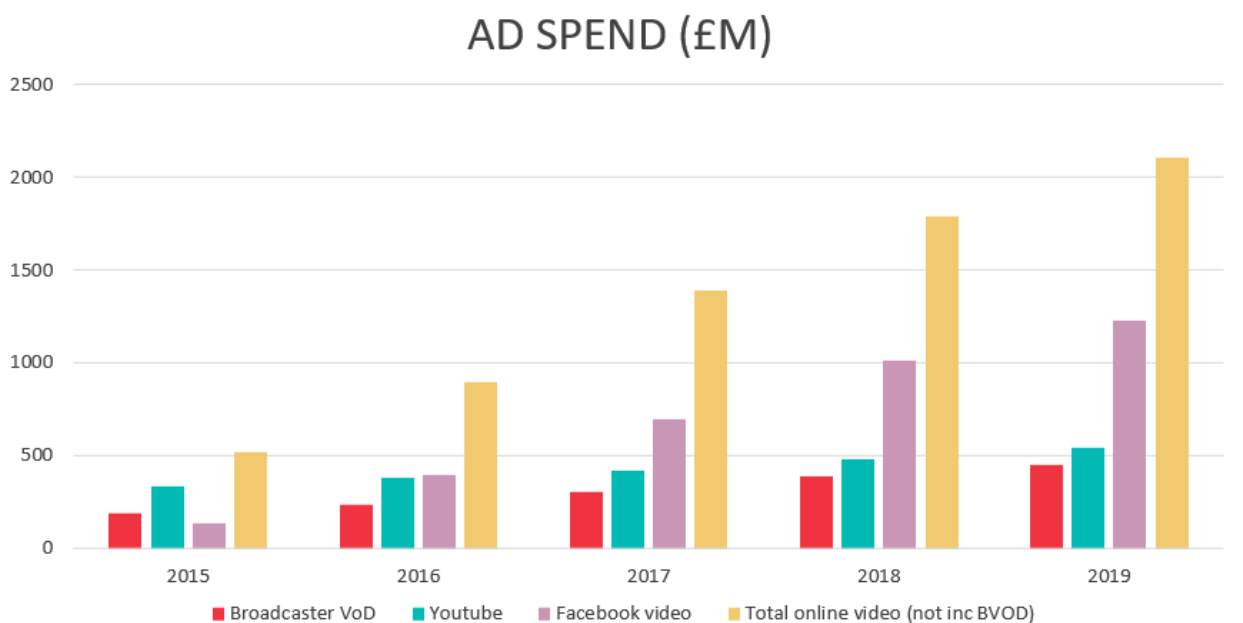
TOTAL ADDRESSABLE AD SPEND (£M)

Source: AA/WARC, IAB UK, BK analysis

[10] Speaking at the Future TV Advertising Forum, December 2017
[11] Speaking at the Future TV Advertising Forum, December 2017

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Advertiser spend on broadcaster VoD services was on course to exceed £500m this year had the entire market not been undermined by the global pandemic. Broadcasters have attracted spend on advertising in their catch-up offerings at a level that now compares to the extraordinary success of YouTube in the UK. However, advertiser spend associated with Facebook's video propositions has been growing at an impressive rate, multiplying threefold from 2016 to 2019. Total online video advertising spend in 2019 was almost five times more than the sum attracted by broadcaster VoD services.

AD SPEND (£M)

Source: AA/WARC, IAB UK, Ofcom, Enders, BK analysis

Choices for advertisers in the online video space are continuing to proliferate and a notable trend over the last couple of years has been the introduction of more AVoD services. Some of these, including Fox's Tubi, ViacomCBS's Pluto TV, Roku's Roku Channel and Samsung's TV Plus, already have a presence in the UK market. Others already operating in the US are likely to seek UK distribution opportunities in the future. In all cases, addressable platforms will feature as a key element of their distribution strategies.

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CONCLUSIONS AND OUTLOOK

The evolution of addressable TV has certainly helped broadcasters 'level the playing field' with the online advertising giants and helped convince advertisers that television is a medium with a future driven by innovation. However, 'addressable' should be viewed as complementary to traditional broadcast advertising and not as some form of replacement. Even the most vociferous proponents of addressable will likely concede that it is through a flexible combination of broadcast, addressable linear and addressable VoD that advertisers can maximise both the reach of their commercials and efficiently control their viewing frequency.

The promise of addressable is an opportunity that should be fully embraced by British broadcasters. Whilst the notion of a 'joined-up strategy' is perhaps an over-used platitude, there is certainly a strong case for a more coherent industry approach in the UK. There is considerable potential for additional cooperation at both the horizontal consumer platform level and the vertical platform dimension described in this paper. In practice, this could mean further deals to align the consumer platforms able to deliver linear addressable and extend their reach beyond the current household numbers to enable targeted commercials to more viewers on a greater range of channels. It could also mean the forging of collaborative arrangements between broadcasters to exploit vertical platforms like the Planet V venture being rolled out by ITV.

The success of broadcaster VoD has come despite a somewhat fragmented consumer experience, with each company operating its own service and separate app ecosystem for which prospective viewers must sign-up individually. Whilst the UK version of Britbox represents some limited collaboration between ITV and BBC for SVoD, there is arguably an even stronger case for more collaborative aggregation of broadcaster

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AVOD services. This would not only provide more scale for advertisers, but also potentially improve the consumer experience, making it easier to find and view relevant content. A more expansive aggregation play by broadcasters could also provide a viable distribution channel for the growing number of international and domestic AVoD services seeking effective routes to reach British viewers.

The theme of collaboration and 'joined-up-strategy' is also highly relevant to the issue of measurement, which is one of the key dimensions underpinning progress towards more advanced TV advertising. There are at least three germane industry initiatives underway intended to improve the TV audience research that advertisers can draw on. For a number of years, the Broadcasters Audience Research Board (BARB) has been working on methodology to extend measurement to the growing number of viewing devices beyond the TV set. This Project Dovetail resulted in the 2015 introduction of coverage of broadcaster VoD services and most recently in January 2020 began reporting of unduplicated reach and time spent viewing across the three screens: TV sets, tablets and PCs.

Sky and its parent NBCUniversal have their own approach to cross-platform measurement called CFlight. This measures live, on-demand and time-shifted TV advertising buys using a common impression-based metric familiar in the on-line world and is being expanded to cover co-viewing of streaming content, viewing outside the home and short-form video.

A third initiative comes from the advertisers themselves via ISBA (Incorporated Society of British Advertisers). This so-called Project Origin has a broader and perhaps more ambitious agenda to development a set of practical recommendations for cross-media audience measurement (i.e. not solely focused on TV, but across all forms of advertising outlet). Overall industry confidence in addressable TV advertising would certainly be helped by more clarity and coordination between all these various initiatives that are underway right.

Ben Keen

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For more information, please see our website: www.britishscreenforum.com
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