JUL 2022

the **bigger picture**

The Japan Edition

Cadressability bringing trust to targeting

mediacom

from the Editor

Together we stand on the edge of an incredible opportunity to redefine what transparent, private, relevant connections can mean for brands and audiences.

The world around us is entering a period of unprecedented change: consumer, occasion and media behaviour are transforming in front of us, while important updates in media regulation mean that we must rethink our approach to data-driven advertising.

Digital has sparked people's imaginations and broadened their horizons. Consumers are curating their entire lives in a new choice economy. Playtime has shifted from appointment viewing to curated streaming, and shopping is now a choice of a seemingly endless aisle of shelves. 91% of consumers say they are more likely to shop with brands that provide offers and recommendations that are relevant to them. But are we living up to expectations?

Data captured just based on intent or from a 3rd Party Provider or used primarily for retargeting, has seen trust take a dive. Only 21% of consumers in APAC now believe that providing more of their data to companies leads to better products and services, while 83% have taken some action to restrict information companies collect.

First released for APAC in February 2022, this whitepaper has been widely referenced in marketing events and publications. This Japan edition aims to bring Japan specific learnings to our clients and partners here.



Josh Gallagher Chief Operating Officer, MediaCom APAC



4 things every marketer needs to know about addressability

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Why use addressable media & message?

A win-win for brands and their consumers. Addressable Strategy allows brands to create communication opportunities that are personally relevant and trusted by consumers.

As targeting data reduces due to cookie depletion and privacy regulations, the ability to make every impression count lies in how and what we communicate in our ads.

Through this document we hope to inspire marketers to start thinking 'Addressable Strategy' as an experienceled communications layer which delivers business objectives. To inspire action, we also provide the requisite building blocks from where to start this journey.

Wendy Siew Managing Director MediaCom Japan



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What is addressability?

A single view of the consumer that moves away from just digital retargeting and takes into account context, intent and motivation to target personalized content through a broad range of media channels. Planning media and message together.

3

When do I use addressability?

Making the right decision starts with audience understanding, not technology opportunity. Addressable is "right" when you can find the right person and the right time, using data-signals that reveal the highest potential opportunity for relevant messaging.

4

How to do addressable well?

A clear process that plans out messages based on data but is able to test, reapply and scale new principles for success.

Growing through Addressable

Breaking the trust barrier for consumers starts with reframing what personalization can mean for brands. When done well, it can be a sustainable growth strategy, not just a tactic.



The Challenge Hard-to-convince, lucrative segment

Uber Eats is the dominant player in Japan with little headroom for growth. The biggest growth opportunity was to target the 40+ demographic. They have a higher disposable income but lacked awareness for this foreign food delivery service and felt that online food delivery "was not for me".

Their media consumption behavior was also erratic making them harder to catch. How do we then drive awareness & consideration amongst this segment?

The Strategic Thinking Personalised messages = more relevant

To get these Japan 40+ to be aware and consider Uber Eats, generic messages for a broad audience would not work. We needed to identify key catalysts that will motivate them to use Uber Eats and present these messages in a personalized manner in moments when & where it mattered the most. While categories like travel, finance, and apparel continue to leverage data led activation to drive pure Return On Investment, mass market brands have started to see the value of scaled personalised communication as a vehicle which drives both long-term and short-term business.

Uber, as shown in the case below, have used targeting not just to reduce churn or increase customer lifetime value but to identify and unlock new audiences for growth.

Uber imes mediacom

Building Uber Japan's Addressable System

How we enabled one of the most data-rich brands in the world to leverage data & technology to help drive brand growth in Japan

The Idea & Execution

A data & tech system that delivers personalized messages at scale

We saw this as a perfect opportunity to build an Addressable System for Uber that delivers personalization at scale. For the first time in Uber, we would use data & technology to discover peak ordering moments, identify the data signals that for those moments, plan assets & platforms against them, then design dynamic creative templates to enable Uber to deliver messages that speak directly to different individuals across Japan all at the same time.

The Solution

Activation of the dynamic assets







Frame 1: Temperature as trigger

The Results

Frame 2: Cooling food to match the weather

Frame 3: Call-to-action to have food delivered.

The 'heatwave addressable activation' significantly increased awareness and consideration with the Japan 40+.



+19% more CTR on Google Ad Network +49% increase in VTR on Instagram



We put the Addressable System to the test during one of Japan's hottest heatwaves with outstanding results!

01

Why use addressability?

Consumer experiences, both in the real and virtual worlds, are increasingly becoming curated. People want the personalized choices that most advertising assets do not deliver. **Even though digital now makes up 40.8% of media investments in Japan and consumers spend 3hrs 39mins of their time on connected devices which allow advertising to be served personally through technology, only 1% of that advertising passes the 'relevance test'.** Precision marketing, up until this point, has been digital only and focused on a single point in time – a broadcast TV ad or a hyper re-targeted digital ad – not the full consumer journey. Brands need to move to new business models where the experience with consumers is more fluid.

Addressability combines the increased 'Opportunity-to-See' with an ad with a more compelling 'Reason-To-See' a relevant piece of communication.

Source: eMarketer, Oct 2021



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Key takeaway

Addressable is not an activation tactic, but a holistic strategy aimed at more relevant media and message choices.

A win-win for brands and audiences

Consumers are curating their entire lives. Playtime has shifted from appointment viewing to curated streaming, and shopping is now a choice of a seemingly endless aisle of shelves. In the new choice economy consumers are no longer bound by pre-selected finite choices of content, commerce, or even interaction.

Why should brand marketing be different?

We live in a world where consumers have come to expect personalisation



Of Japanese consumers say that **personalized pricing is effective**.

Of Japanese consumers feel uncomfortable when ads are not related to their tastes or are far from their interest.

Of Japanese consumers **don't like it** when targeted ads are not relevant.

Source: Consumer's Affairs Agency Survey 2020 (Government of Japan)

Whilst driving personalisation is central to all brand transformation plans



Of marketers say **personalization advances customer relationships.** Evergage Trends In Personalization, 2020

Of companies report seeing an **uplift** since **implementing personalization**. Econsultancy Optimization report, 2018

Of marketers say **personalization** is their **top priority**. Smarter, HQ, The State of B2C, Marketing Report, 2018 This is critical for brands because the competitive set, and the expectation on experience, is widening. Online retailers like Amazon or Lazada have become personal shoppers that also produce original content. New tactics and new models are needed to build engagement opportunities with consumers.

Meeting the expectations of brands & consumers

We know that in many categories the active consumer journey reaches hours in length, in that time hundreds of exposures to an ad are bought, millions of ad impressions are served, and billions of tags are dropped on an individual. This gives us an amazing view of behaviour, a huge wealth of data but also the ability to lose ourselves deep in the long tail of application.

To understand the potential of Addressability, it is easier to comprehend the limitations of current solutions touted as solving the same problem: precision at scale.

Precision has been achieved via methods such as Dynamic Creative Optimization (DCO) where users are served personalized, target messages based on the last action. What often happens is we receive yet another message to purchase the trainers we just bought! By forcing a Reason to See (RTS) the experience falls short on understanding the context that the user is in, it also lacks the scale required to make a significant business impact by being limited to one-to-one experiences on programmatic digital channels.

Scale on the other hand has been achieved through media channels with high Opportunity To See (OTS) such as Television and Out-of-Home. These channels are measurable for planning and tracking. However, slow methods and a lack of available technology have made the changes required for personalization impossible.



Delivering Precision and Scale

Addressable media & message aims to solve the myriad of problems associated with 3rd Party Data use by having a clearer understanding of how we can match consumers' expectation for personalization, without the incessant need to retarget. This is achieved by using a mix of signals that better understand consumer intent, motivation and the context they present themselves in. Combining **Opportunity-to-See** and **Reason-to-See** delivers the right person at the right time with right message.

Opportunity-to-See

Digital channels, including TV & OOH in some markets, are now capturing data that gives greater understanding of audience context, motivation and intent. Opportunity to See can now be fuelled by more information on who & where audiences are, delivering the number of exposures required for scale.

Right person Right message Right time

Reason-to-See

With this targeting data, content can also become more relevant to a specific moment, shifting away from the intrusive nature of a retargeting advert. The actual exposure now benefits from increased quality, reduction of frequency, or the use of all of the available data signals used for relevance – or all of the above.



Uber Eats

F:NECAST *available in Japan Q42022

Preventing overexposure

We have all been in this situation. You have watched a TV ad or video, sometimes so many times that you have changed the channel to Netflix or skipped it (again) on YouTube. You go on to a website, make a relatively seamless purchase of a new pair of trainers. Next thing you know you are getting programmatically retargeted with a 'personalized' piece of content trying to sell you the same thing you just bought. Yes, this has used a valuable data signal showing at some point in your journey the motivation to make a purchase. But in a silo, it misses the mark. Not only has the advertiser wasted precious

budget on a person who has now already made a purchase, it breaks the trust of the consumer who now thinks that the brand may not be a suitable fit and is hyper-aware that their personal data is being used against them.

New solutions are here to improve the experience. Controlling the frequency of irrelevant ads is no longer limited to online capping. Uber Easts, along with Finecast in Australia, have run Connected TV campaigns using Finecasts ID (Reach) Solution, which allows for a cap that prevents overexposure and enhances the brand experience for consumers.

Campaign Highlights

98% Average Completion Rate



Unique Households Reached

2.30 Average Campaign Frequency per HH

Multiple creative assets for audiences, targeted to postcode level for UberEats delivery





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Using advertising that is relevant to audiences in both media and content, Uber Eats addressable solutions produce more efficient execution and impact key brand metrics.

93%

Brand Awareness across total respondents

75%+

Ad recall across the Exposed Group

109%+

Uplift: Plan to order Uber Eats within the next week

54%

Of total respondents prefer Uber Eats over competitors

Measured through an automated solution from Kantar Lightspeed that monitors the impact of Addressable TV using real consumer data from 511 Panel Members in Target Postcodes using exposed vs non-exposed.

02

What is addressability?

Precision versus Scale has been an ongoing industry debate that has split the line between digital and analogue. This line is fading rapidly. The opportunity which brands are seeking to leverage is the sweet spot in the middle – **Precision with Scale.**

The tacit trade off when consumers give us access to their data is that we are now able to build and deliver

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experiences that consumers lean in to. This aims to build back lost trust, where 83% of APAC consumers have taken some action to restrict information companies collect.

Addressable reframes this data deluge into a simple matrix of Context, Motivation and Intent, making the actionability of signals more relevant.



Key takeaway

Understanding audiences through a combination of Context, Motivation and Intent data is the fundamental building block of a trusted media & message ecosystem.

Magic in the middle

The next era of effectiveness will be unlocked by integrating media & message together. Addressability delivers on brand suitability for audiences – getting the right message in front of the right person.

In addressability, brands have the opportunity to not just programmatically target an audience but deliver specific content to desired audiences through the combination of context, intent and motivation data.

It bridges the effectiveness gap between scaled communication delivered on broadcast channels and one-to-one precision of retargeting.

This **magic in the middle** is regarded by

51% of marketers as their top priority.

Smarter, HQ, The State of B2C, Marketing Report, 2018

Data that allows brands to market with their audience



The ability to deliver product or service messages to specific cohorts can now be applied to Television, OOH & Digital Channels.

Better targeting

With the application of the right data, professionally produced content can now be targeted to different households across on-demand, live streamed and linear viewing environments. Blending granular data and panel-based research, video content in all formats adds to the arsenal of marketers a perfect middle ground that that reaches the correct audience on trusted platforms.

Full-funnel impact

With new delivery mechanisms, addressable enables brands to reach new audiences on new platforms to drive performance across brand, consideration, intent and sales KPIs.

Faster Feedback

Due to its real-time, data-driven nature, campaigns are more measurable with agile feedback loops on performance, giving advertisers more flexibility, realtime insight, and the ability to optimize campaigns accordingly, whether that's the creative, audience strategy, budget, or a combination of those and more.

Addressable channels can now provide the benefits of both personalization and scale.

*The coverage of addressable channels such as TV & OOH are not available in all markets at this stage thought the same principles can be used for all digitally enabled media

Just because you can doesn't mean you should.

Being more purposeful with the way that we use data for media & message will help advertisers achieve magic in the middle.

This means that we achieve relevance: on one hand we are developing a solution that goes beyond a one-size-fits-all approach that is too broad while not running the risk of intruding in to consumers browsing behaviour with messages that hit the 'right person at the wrong time'.

Data being captured just based on intent or from a 3rd Party Provider has seen trust take a dive. Only 21% of consumers in APAC now believe that providing more of their data to companies leads to better products and services, while 83% have taken a some action to restrict information companies collect. By adding context data, and not just relying on one-set of data, more relevant advertising has the ability to deliver a more transparent value exchange for consumers.

We consider addressable solutions as a way to reset historical practice.

Combining Data for Media & Message success

Successful execution lies in the middle. Media & Message planned together, delivered to audiences using a combination of context, intent & motivation data signals. Layers of previously disconnected data gives new insights on the consumer as well as a more relevant delivery mechanism. While the individual signals may differ based on market data availability (volume & quality) and the nature of the category, combining metrics will provide deeper and more actionable opportunities that complements the consumer's probable needs.



Making data addressable

With increased digitization and erstwhile offline channels now shifting to digital distribution, we are awash with data. However not all data is made equal and to truly unlock data's potential requires an integrated process from data assimilation to activation,

GroupM have invested in technology (mInsights + Choreograph) which allow brands to warehouse + analyze multivarious data feeds into addressable audience segments. Data layers ingested:

- o 1st party data
 - client owned data
- 2nd party data

 data generated through media activation
- 3rd party data
 data received from data
 providers e.g. credit card data
- Survey data

 data recruited by surveying consumers

It is important to know that these are not set & forget, 'time-bound' segments. Technology [such as mInsights] takes things like quarterly polling data but ingests and analyses real time data across Context, Motivation and Intent to provide real-time enriched audience profiles.

Machine learning and Al subsequently analyses these data sets to Segment them into Audiences that can be activated. This is the foundational bedrock of addressable activations – as it provides:

- Strategic inputs + confirms or disproves consumer hypothesis
- Planning inputs to identify right placements
- Addressable audiences whom we can reach via our advertising



When do I use addressability?

Not every campaign is addressable, but it can solve some communication challenges.

Start with setting clear, achievable goals that include the campaign size, audience volume and a budget that allows for more than smart re-targeting. Evaluate the data in a signals led approach that includes the availability, volume and usability.



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Key takeaway

Addressable campaigns manifest themselves in multiple ways, its critical to start this journey with a clear objective and feasibility assessment, not a tactical capability.

Making the *right* decision

Lower funnel solutions for personalization have become the default. Re-targeting website visitors is easy. Measuring last-click ROI is easy. The use of Technology powered Content is easy but has often lacked real audience understanding – you targeted the right person, but not at the right time with the right message.

Getting to an addressable solution shouldn't be overwhelming. Start with a few macro questions on your 'Campaign' or 'Market' readiness to run an addressable solution. Once the opportunity is established, get addressable right by layering in specific thinking around Data sources, Media channel opportunity and Message suitability for your brand.

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How big is the campaign opportunity?

Addressable activations can be applied for use cases across the funnel from driving Awareness with precision to converting prospects with relevant catalysts and promotions.

Addressable however is not a force fit solution which can be applied across every campaign – as in its best rendition, it leverages data signals to deliver data led communication – which require certain factors to hold true.

We have looked at the key indicators which should be used to evaluate the feasibility of applying addressable to a campaign.

Question	Addressable suitability
Size of Campaign: Campaign weeks on Air Campaign budget	Campaign is on air for at least 4 weeks. Campaign has sufficient budget to meet minimum reach requirements after including incremental cost of tech/data/production.
Suitability Does the campaign lend itself to using Geo/ Day part/ weather signals?	The inclusion of precise audience/ targeting signals addresses the overall brand / campaign objective. For example, communicate hyper local offers to consumers in the vicinity of specific retail outlets.
Availability of Data	The market has sufficient and validated data which can be activated on the most used media channels.
	Start with the campaign and brand objectives and relook at how enabling real time data signals add value to the overall output. Size the opportunity – having a minimum threshold sets up sufficient room for optimization and will provide tangible, granular insights at the very least which could be re – applied in future activations.

How mature is your market?

Digital maturity is varied across individual markets in APAC, based on internet penetration, quality of internet, maturity of the digital and programmatic advertising ecosystem, and most importantly the availability and usability of audience data sets which brands can leverage.

As brands across categories are taking concerted steps to build their owned and operated audience data, addressability relies on a combination of audience, behavioural and temporal data which would vary in scale and quality between markets.

Cisco's 2020 SMB Digital maturity study calls out that 29% of SMBs in the region are looking at digitization having a positive impact on their experience, marketing and sales. The study further breaks down the level of digital maturity in the region by market, highlighting first that APAC as a region is at the cusp of moving from a digital observer to a digital challenger (more mature).

Amongst APAC markets, Japan indexes positively in the pace of digital acceleration. Top digitization priorities for Japan are (1) Market expansion, (2) Improvement of operations and service delivery and (3) Improvement in Sales & Marketing

A few key factors to consider when starting to implement addressable would be:



Scale, quality and recency of owned and operated data



Scale and quality of third-party data E.g. purchase data from supermarkets, location data from Telco's



Maturity of programmatic advertising DSP (Global/Local) + SSP (Global/Local) and % of digital spend being routed to biddable channels





What combination of data can be used?

The combination of the three signals aims to leverage the agile advantage of programmatic media delivery.



Context

This approach uses a variety of both online and offline signals such as geography to determine residence, purchase through shopping location or even interests at an event. This can include weather for certain brands. In an online world semantic understanding of language is combined with keywords and URL or page level categorization to deliver segments based on content browsed.



Motivation

This is where a range of audience affinity signals are used as proxies for a desired outcome, identifying those through internal and external data points allows targeting through content.





Intent

This approach uses onsite search to build an understanding of intentions, desires and probability of performing an action, often used for retargeting purposes.

Questions to ask



Does the campaign's message lend itself well:

- to region or city level geolocation?
- to time of day or day of week targeting?



- Should this campaign be targeting a single very broad audience or does it lend itself well to talking to smaller cohorts?
- Are there audience segments already identified and built in your market?



 Would leveraging first party data (i.e. current, non & lapsed users) add significant value to messaging?

The case for context

Victoria Government Fire Safety Real time FDRs

> 10:17 – 12/01/21 MELBOURNE FIRE DANGER RATING IS VERY HIGH

Fires can start and spread quickly in today's conditions. Check the Fire Danger Rating before travelling.



Summary

Following the devastating fires of 2019/20, Victoria Government wanted to remind holiday makers about the ever-present danger that bush fires during the summer represent.

As Victorians headed to the coast, we needed to find a way to provide the most relevant and timely information across multiple locations to maintain a heightened sense of awareness.

The Campaign

The campaign used live FDR ratings to trigger relevant corresponding safety messages to help raise awareness of the exact fire rating at that point in time. The campaign also served to inform and educate Melbournians as they travelled into regional areas on how to help minimise danger and prepare them on how to act in an emergency.

This messaging was extended across other dynamic and addressable formats including CTV, Social and Display with over 150 individual assets produced in English, Cantonese, Mandarin and Arabic.

Results

An average of 53% increase in ad recall compared to previous campaigns across DOOH and an average of 23% increase across the campaign.

> 10:17 – 12/01/21 MELBOURNE FIRE DANGER RATING IS EXTREME

If a fire starts today, it will be fast moving and unpredictable. Avoid bush and grassland areas.

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How to do addressable well?

The benefits of Addressable stretch beyond the intelligent identification of Context, Motivation and Intent signals.

This data allows for more intelligent asset creation through the setting of the right KPIs.

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Optimized, addressable creative has seen media performance increase by +25%.

The right KPIs also deliver a more structured measurement and technology approach. Teams are empowered to work in a more agile way to create, deliver and optimize at speed.



Key takeaway

Start building addressable capability and solutions with a view to scale. Utilise learnings to scale successes – but keep learning.

Intelligent Application

To win in with media and message a three-step process produces an informed, intelligent, and dynamic strategy



Which media do I use?

Programmatic media is evolving at a rapid pace. When people talk about addressable media, what they mostly have in mind is personalised 1:1 digital marketing. We should stop looking at addressability as a channel.

Thinking non-linear

Addressable communication can now be used in any nonlinear channel. Video is currently the best example of the evolution of channels that can now be bought programmatically, with unique data points across multiple formats. In markets like Japan which have historically been linear TV dominated markets – the volume of advertising supply on Connected TV has grown by 1.9x over the past two years, it has grown 4.3x in Australia.

ROI for TV remains unrivalled, but for many brands it is becoming expensive to sustain a profitable presence. The rising cost of linear TV and the erosion in reach means that the threshold at which brand activity is driving a sales or other business outcome is out of reach.

Addressable TV now present in Australia, Japan, India, offers a place to turn; its efficient targeting makes it cheaper without compromising screen size or coverage, while responding to key trigger moments.

Addressable use case

Activating E-Commerce Share of Voice data

Let's look at share-of-voice. Take any highly competitive category. Using real-time competitive insights, we can link up the moments a competitor changes a product, promotes a new feature, offers a new price point or targets a new geography – and respond within seconds, by region, daypart or creative, enabling us to combat rival SOV and command the highest attention and visibility.

Trigger	Addressable opportunity	
Competitor changes product on E-Com shelf	Feed based ad of competing product activated on Social with dynamically inputted promo message	
Competitor changes price point of a product	Ads targeted to New users include Trial promo at competing price point	
Competitor targets a new geography	Geo targeted ads implemented with Geo specific messaging (Awareness/Promotion)	



Which creative do I use?

Technology in fast moving content is changing the game. Using research and cloud computing, creative assets can now be converted into data & insights in order to drive superior performance. With 50% of the result of a campaign on the line, analysis for content that is personalized and scalable is critical.

While 'Hero' pieces of creative may still be more art than science, any piece of creative that is addressable via adserving can be analysed by:

- a) Looking at a standard set of performance metrics such as CTR, VTR, ER, etc.
- b) Computer Vision can then identify all of the elements of an advert including objects, colour and text.
- c) The result is Artificial Intelligence that is able to understand Attention, Emotion and Meaning of any advert that can inform new asset production.

Applying creative insight

Along with the analysis of the asset itself, brands can apply their understanding of Context, Motivation and Intent into the asset.

Asset Creation

Truly using data to inform creative guardrails, hypothesis & ideation.

Optimized Creative

Focus spend behind the assets we know will deliver on client KPIs.

Campaign Evaluation

Shine light on the elements within a campaign that drove performance.



What was in the ad? Al for generating huge amounts of visual metadata.



What was seen? Al which understands where user attention is likely to be focused.

the **bigger picture**

Seeing the bigger picture means that we help our clients look beyond the boundaries of traditional media to uncover new ideas and unlock growth. We challenge conventional thinking to build, optimise and drive our clients' businesses forward at scale, as well as leading our industry in critical areas such as diversity, inclusion and sustainability.

At MediaCom APAC we are committed to sharing through practical thought leadership with the industry. Our whitepapers and virtual event, **loop_live** are publicly and freely available to all marketers. Keep an eye out for upcoming editions and events as well as a wealth of past publications on our <u>website</u> and <u>LinkedIn</u>.

Keen to discuss how MediaCom and our leading addressable solutions can help your brands grow?

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Measuring success of addressable

When done well, addressability can be a sustainable growth driver, not just a tactic.

When building the holistic strategy for addressable media, it is important to put a robust measurement framework in place. At the foundation, this must be based on the business objective and the campaign KPIs. The three key indicators can be defined as media performance, media quality, and brand metrics, which each have their own metrics and expected outcomes.

Key indicator	Metrics - measured by:	Expected outcome
Media Performance	Reach : Impressions/CPM Engagement: CTR/VTR/CPCV/ Cost per visit Platform and Ad server data	Positive increase in Engagement rates Media cost – flat or improved
Media Quality	Viewability + Attention 3 rd party tech – MOAT, Lumen, Playground XYZ	Overall increase in Viewability and attention metrics
Brand Metrics	Brand Lift Brand Lift studies – Platform Holistic brand lift studies – Kantar/ Nielsen	Improvement in Brand lift



Preparing for the future:

Data generated by addressable campaigns provide marketers multiple levers with which to build and scale loops of learning and optimization.

As these campaigns do not follow a traditional fixed plan to activation schedule with retrospective data being the output, planning and trading can utilize granular data across audience + channel + asset to make faster decisioning. It also facilitates a much larger and prescriptive data set with which to influence future campaigns.

As we start to make the shift towards a future with scaled down identity data, addressable is the layer which generates 1PD and 2PD data sets to continue applying precision.