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](http://quotes.wsj.com/OMC) [OMC -0.86%](http://quotes.wsj.com/OMC?mod=chiclets) research 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 – aren’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 AppleTV and Roku, and via streaming services like Hulu and [Netflix](http://quotes.wsj.com/NFLX) . 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 technology 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](http://quotes.wsj.com/FB) , along with telecom “pipes” like [AT&T](http://quotes.wsj.com/T) and [Verizon](http://quotes.wsj.com/VZ) , 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 datasets 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.

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