

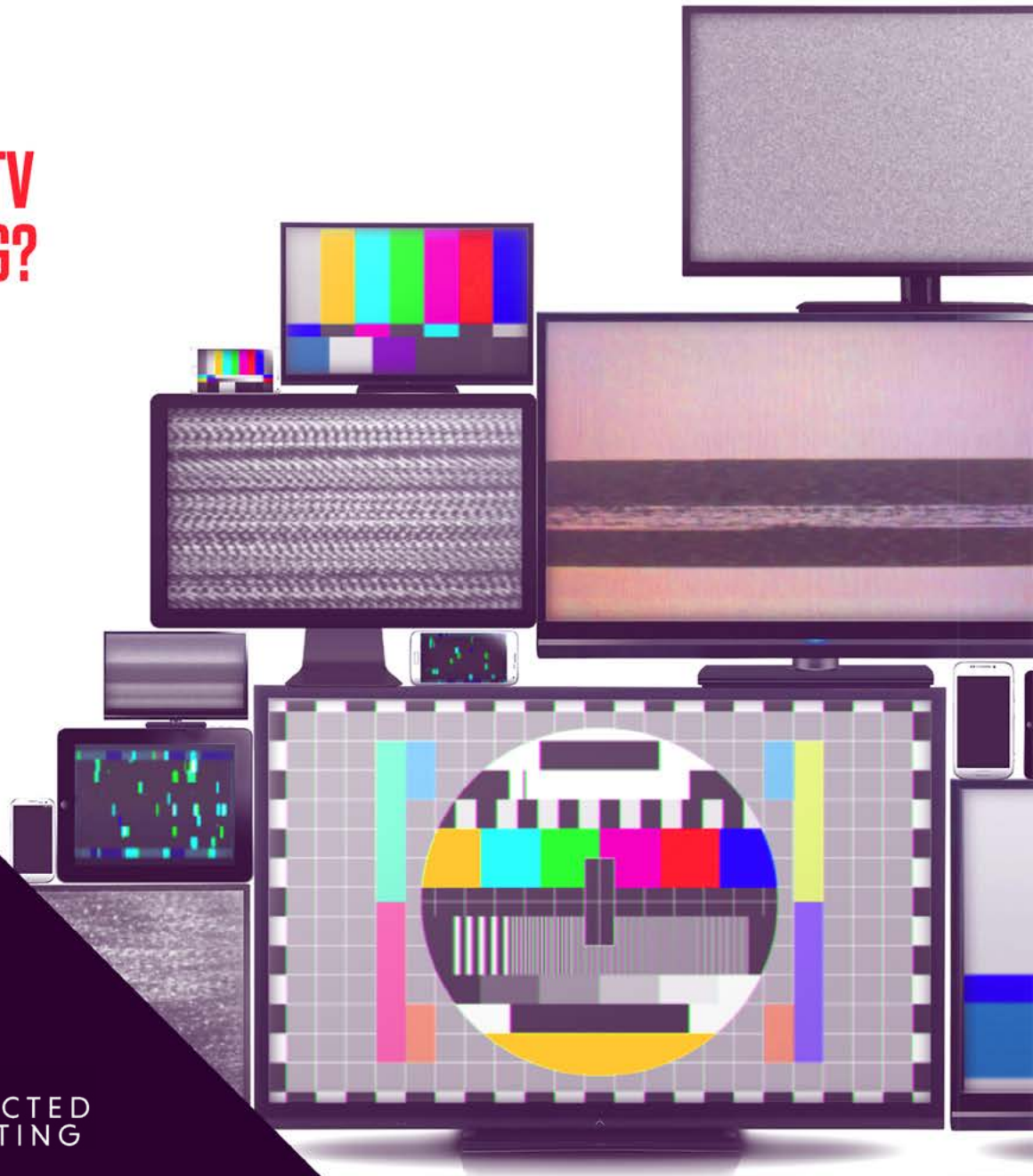
EBOOK SERIES

# TV IS MORE THAN TV



## PART 4

IS CONNECTED TV  
DISCONNECTING?



# KEY TAKEAWAYS

In this short ebook you'll find out:

- ▶ Why CTV walled gardens are emerging and what they'll mean for marketers
- ▶ What your options are when CTV data is not available via DSPs
- ▶ What tech is out there now (and what's coming) to help you reach and convert the right TV audience

# INTRODUCTION

It used to be simple. The TV was the largest screen in the house. You knew what shows were on by looking at the schedule and you knew (approximately) who was watching from the ratings. Then it was just a case of buying as many slots to hit the demo you wanted as your budget would allow.

Okay, so maybe it was a bit more complicated than that. But compared to today, TV was a cinch.

Nowadays, TV is a multichannel, multiplatform, multi-device conundrum.

By watching video on their mobiles, their laptops, their tablets and their connected TVs, consumers are generating the kinds of data that media buyers of old could only dream of. But connecting all that data together, digging out the insights, and then activating them in unified campaigns that reach audiences across all the things that now count as TV is really, really tough.

And getting your TV strategy right is what this ebook series is all about.

In our first three books, we look at how marketers could [get more from YouTube](#), TV's evolution [into a performance channel](#) and the [myths of buying TV inventory](#).

Here's the last part in the series, in this ebook we are exploring the complicated but really important topic of CTV walled gardens and how to be prepared for the changes that are coming sooner than you think.

**Let's jump in.**



EXPERT INSIGHTS

## Bridging the gap between TV and digital

Want to learn more about the new types of TV data available to advertisers? We've got an ebook for that, too. Get an introduction to Advanced TV and Automatic Content Recognition data, how it works and how it can be used to improve your campaigns.

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## WHAT'S CHANGING?

It all comes down to data. How it's collected, who gets it, how it can be used and where it lives. For advanced TV, all of that is up in the air right now.

All that beautiful data that has been driving your CTV campaigns for a while is about to be much harder to get.

Before we explore this big change happening in CTV, we should take a step back and look at a bit of the history of TV and data.

When we started with plain old linear TV, ads were bought and displayed with the hope that they reached the right consumers. The data that was collected about viewers was pretty minimal. The ads could only be targeted by broad parameters, like, time of day and location, and measurement was based on a relatively small panel of viewers, by today's standards. There was no real way to track the outcome and to know if the person who saw your flashy ad actually made a decision to purchase your product.

TV has evolved since then and we have moved into the connected TV era. Brands have been able to get data, lots and lots of information about their viewers. Gone are the days when people sat in front of their TVs and only watched one or two shows at the same time each day and each week.

Now, they are bingeing on shows, movies and other content that is not only on TVs but other devices too. Multiple devices

like tablets, photos and laptops are sharing the stage with the long ago lone screen in homes. All that content is being viewed and consumed differently which means advertisers have to think differently about how to reach consumers. Data has been consolidated across all connected devices and when advertisers buy audience data they get a range of information. All that information can be collected and used to target the right audience.

### Here's where we are today

CTV companies are taking a closer look at the data they collect and how it is being used. And some of them are putting a tighter grasp on their data. They are looking to share the data very differently. Information that advertisers rely on may not be easily accessible anymore.

Why is this change happening now? Because media companies are consolidating, for example Roku bought DataXu, LG acquired Alphonso, Fox acquired Tubi, Disney bought Hulu, and Comcast bought Sky and Freewheel and then Freewheel bought Beeswax. And those who are not consolidating through acquisitions, are building their own ad sales divisions and DSP or data collection technology in-house, such as Vizio and Samsung.

All these changes have led to some of the original equipment manufacturer portion of these businesses (OEMs - the companies

which actually build our TV sets and embed the technology which collects viewership data) to make a decision to not share viewership data with DSPs anymore - because they now have that DSP technology in house.

And here's that big change we were talking about. These companies are starting to put up walled gardens which makes running cross-platform campaigns more difficult. In the future, advertisers will have to go to each distinct media company in order to access viewership data and buy media - all only related to that one platform. So you'll be able to see what Roku users are watching, and then use that insight to target those users on Roku, for example. But it will become increasingly difficult to connect all that data and media together across each distinct platform and achieve the scale of audience reach you may be used to.

All this fragmentation may feel like a scary trend for marketers and brands trying to target consumers on TV. Especially when you think that TV has long been used as the best mass-reach medium, but that reach is being carved up into small, distinct bubbles. What happens now?



# 02

## WHAT DOES THIS MEAN FOR MARKETERS?

TV data disappearing behind the walled gardens of content platforms and OEMs raises a few key challenges for marketers. Let's take them one by one.

### 1 CURBING AD REPETITION IS ABOUT TO GET HARDER

Frequency management was already a challenge, but walled gardens make it even tougher. Rather than buying audiences from data consolidated in a DSP, you'll have to buy them separately from each platform: from Roku, from Hulu, from Samsung and so on - all based around their own individual audience IDs. But, unless you can match up these audience IDs between platforms, there's no way of knowing whether you're showing an ad to two different users or just the same user watching shows on two different platforms. That same ad may be served multiple times since you will be losing the insights provided through consolidated data.

On top of this, it goes without saying that running campaigns across multiple platforms, each with their own DSP which works in its own way, is going to be a serious operational headache. To get an holistic view of their audience, brands and agencies may have to consider doubling back on the common decision over the last five years to specialize their resource and expertise in one selected DSP platform. Taking a more agnostic and 'meta' approach to media trading is going to become more important in a world of distinct walled gardens.

### 2 REACHING THE RIGHT KIND OF PERSON EVERY TIME

Another challenge is making sure there is consistency with targeting the correct audience. If all of your programmatic buying has been with one DSP that defines a millennial as one age range while the CTV company platform defines it as a completely different age range, you may miss a large group of consumers.

Let's say you are a car brand and you want to target 'auto buyers' for your campaign. The definition of auto buyer on each platform may be completely different. A key demographic used by your brand may be missing on the CTV company's walled garden platform. This makes it harder to plan your campaigns and requires you to pay closer attention to each platform's definitions and a more hands-on approach to targeting.

### 3 THE CHALLENGES OF MEASUREMENT ARE COMING BACK

One of the great things about TVs becoming smart is that it has allowed advertisers to connect their big brand TV campaigns to their digital campaigns. This has allowed brands to integrate their campaigns to a far greater degree - by following up TV spots with, for example, programmatic ads served to a linked mobile device. And, as importantly, to measure the efficacy of a TV ad directly. Generally speaking, people rarely buy things directly via a TV screen (for now at least), so being able to tie an ad shown on TV to a follow up action taken by a consumer on their desktop or cell phone has given brands a much clearer idea of what's working.

But as TV data goes behind walled gardens, it's almost like going back in time to the linear TV days, when advertisers couldn't really tie their ad campaigns to sales figures. When data is held by the platforms, rather than being available from DSPs in the wider ecosystem, it becomes much more difficult to connect that data to data from other digital channels, meaning that direct attribution becomes a challenge again.

So, TV data heading behind walled gardens creates some real challenges for marketers.

***The good news is, there are solutions...***

## YOU WILL STILL GET THE DATA YOU NEED

Before you panic, this is not a problem that will be without a solution.

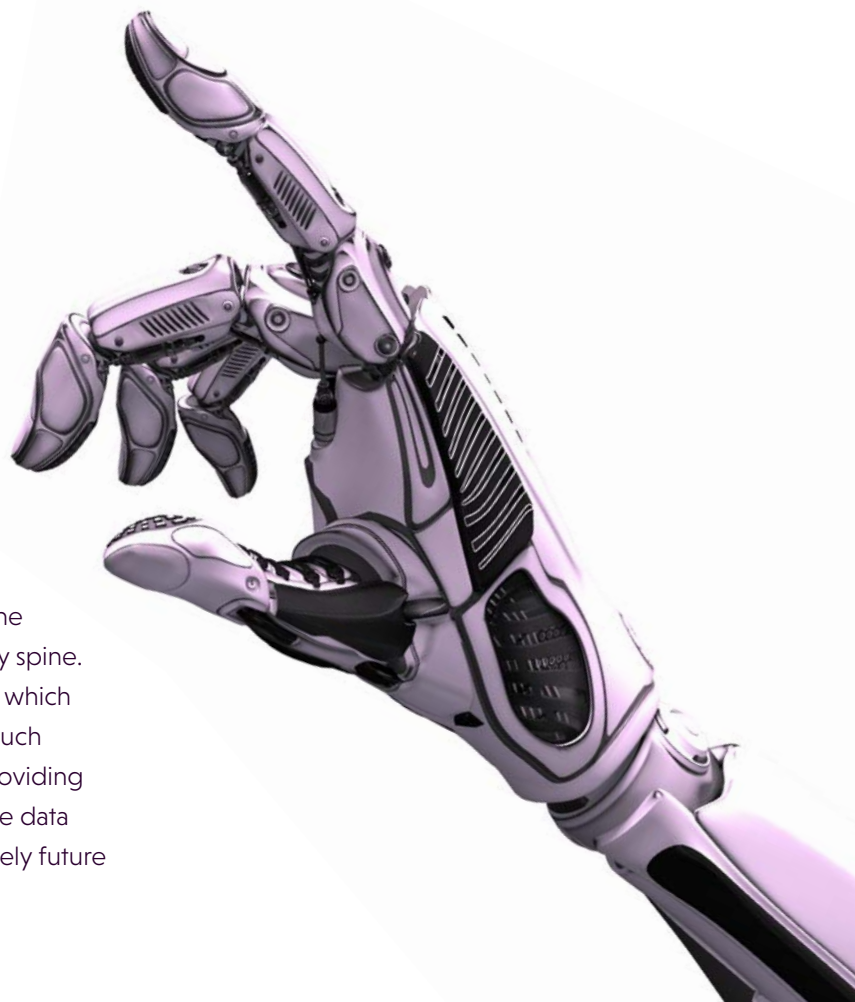
We have to learn how to be better at targeting people without access to their personal details. In this age of data privacy concerns, changes to the way we get and use data are happening fast. As an industry, we already are planning and creating solutions for the cookieless future, and it is highly likely that IP addresses will be next in the firing line from a data privacy perspective. But even without cookies and IP addresses, we will still be able to market to specific audiences. The same goes for data behind walled gardens.

There are new technologies that can help share knowledge across disciplines. The industry is finding solutions that are already being used today to solve these types of problems. Take a look at these options that already exist to learn how they will be used to solve the CTV walled garden conundrum.

### NEW TECH IS HERE TO HELP YOU

#### Identity spines are the identifiers of the future

One solution, which we have used before is the identity spine. This has been used for normal programmatic concerns where data is spread across multiple areas, and can be used for CTV. An identity spine or graph takes data from across multiple sources and connects them together to build a persistent persona that is lacking in real identifying details but still is specific enough to let you target the right person. Recently, we added postal codes into our identity spine. This will help to add geo-location data to optimize campaigns, which is much less identifiable at the individual level and therefore much more privacy-compliant than other types of data - while still providing rich information for targeting. Reducing the reliance on any one data source makes it less of a concern when one goes away, ultimately future proofing through the use of anonymized data.





### **Collaboration will happen in clean rooms**

Clean room technology is an important piece of the data puzzle. They are emerging as a great resource for the sharing of anonymized data. While data used to be shared openly and freely through DSPs, the walled garden model with distinct, gated-off IDs, will increasingly require clean room sharing - and many media companies are already building their own. These secure platforms will allow multiple parties to share data without ever exposing the raw or sensitive information that can identify a specific person. This is a positive for avoiding data leaks but still allowing marketers to compile the data they need. The tricky thing about clean rooms is having the data science know-how to use them, and marketers should be thinking about whether they have the resources for this in-house, or whether a programmatic partner would be able to help.

### **Trading will be omni-DSP; in fact it already is**

We already see that working across multiple DSP platforms is looking like an inevitable part of the future of TV - and media. The trend of media companies building or acquiring DSPs may begin to slow down in the next few years, but for most, this transition is already a reality. Agencies are either going to have to build technology from scratch and find expertise that can work across all these TV platforms such as YouTube, Roku, LG Ads and Fox (not to mention digital-first DSPs like Xandr and The Trade Desk) or tap into media partners who already do, in order to start stitching the audience experience back together.

### **The industry will have to adjust**

Advertisers are always going to be looking for ways to understand and reach their consumers while TV companies always need ads. While this announcement of media companies consolidating and data being locked behind walled gardens seems ominous, that industry will naturally have to mature in response to what the marketers need from them. More supplier power doesn't necessarily mean only supplier power. Interoperability will be essential to ensure that the cycle continues.





# STAY UP TO DATE WITH WHAT'S GOING ON

There's still uncertainty around the future of CTV. We really don't know how it will all play out as we are only seeing the start of the walled garden tactic being used for CTVs. If you can understand what is happening with media consolidations and the shift to walled gardens, then you can get ahead and make a plan.

While we don't have all the answers, we do feel confident that there are certain elements of the future we can already help you prepare for, and marketers will still be able to operate successfully after this change.

The answer to the question mark hanging over the future of TV will be omni-DSP and omni-identifier - and the

best way to stitch all of this together in a privacy-first way will be via clean room analytical expertise.

At MiQ, we look to solve these kinds of marketing problems and want to help advertisers to get the TV data and data science they need to reach the right audiences.

Don't wait too long to reach out if you have questions and want help. We would love to talk to you about CTV and the future of data.

GET IN TOUCH

MORE FROM OUR CONTENT

## THE FUTURE, FASTER PODCAST

The future is coming faster than ever...

Thanks so much for making it to the end of the ebook. Who says long-form content is dead...?

If you enjoyed reading this, maybe you'd like to check out the Future, Faster podcast, a laid back look at the trends, topics and technologies shaping the future of advertising, with some of the smartest minds in our industry.

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