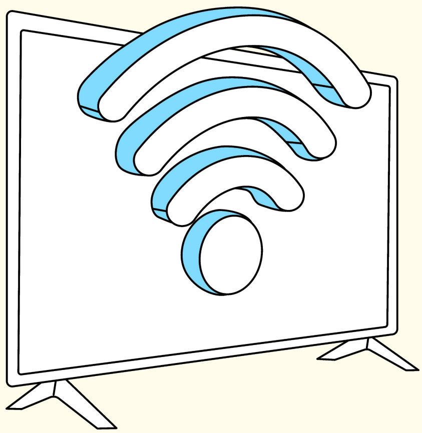
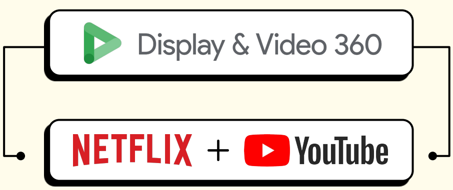
brainlabs

Unified CTV

All the Power of TV, but Better than Ever





TV Just Got an Upgrade

More Power, More Possibilities

The TV landscape has been changing for a while now. This ignites excitement in some, and scepticism in others. But the truth is, it IS changing, and it is changing fast. The decline of traditional linear TV and the rise of Connected TV (CTV) has created a wealth of new possibilities for advertisers, alongside some complex hurdles. CTV's advanced targeting and measurement offer a step-change in capability, but the sheer number of platforms and services has resulted in fragmented campaigns and operational headaches, limiting overall impact.

This whitepaper explores whether the key to future CTV success really lies in bringing these disparate parts together, if it can be done, and if it works. We believe that advanced, cross-publisher frequency capping is a critical tool in achieving this unified approach. Drawing on the results of a real-world test campaign, we demonstrate how consolidating CTV buys across YouTube and Netflix within DV360 can deliver greater incremental reach, optimize advertising spend, and enable the kind of fast, performance-led campaign adjustments that linear TV simply can't offer. We are not saying it's one or the other, but we are saying that CTV is now a huge part of TV, and if you aren't winning there, you are missing a key piece of the puzzle.

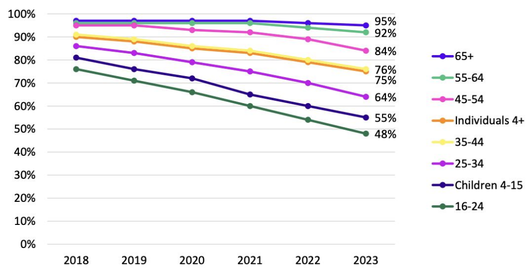
01 The shift to streaming

We all know that TV is one of the strongest comms channels at our disposal, and for good reason. The high attention, storytelling power at scale has made it the cornerstone of advertising.

But linear TV consumption is on the decline while CTV consumption is on an upwards trajectory and is set to continue. This shift has been fuelled by smart TV adoption (80% of UK households), pandemic-driven content demand, and significant content investment by major streaming services like Netflix, Disney+, and Amazon Prime Video

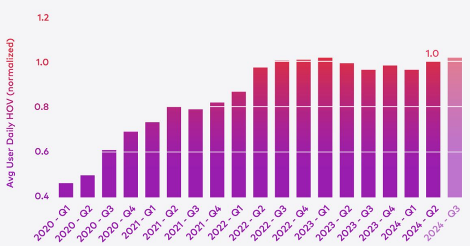
Linear TV consumption is on the decline
With fewer people watching, and spending less time when doing so, our opportunity to reach our target audiences diminishes in Linear TV alone.

Figure 4: Average weekly reach of broadcast TV, by age: 2018-2023



Source: OfCom Media Nations Report 2024

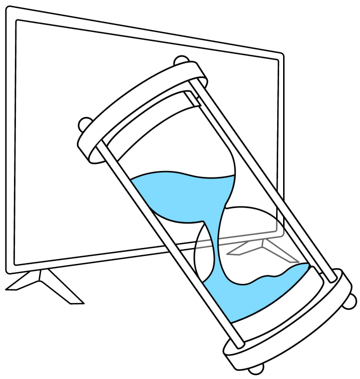
Average daily HOVs are increasing again



Source: Wurl, 2024 CTV Trends Report

CTV is on the rise
Not only are more users watching CTV, but they are spending more time doing it - showing that CTV is an environment that our audiences are finding increasingly engaging, and giving advertisers more opportunity to engage with them.

This means that not only are more people watching CTV, but they are spending more time doing it - representing a larger proportion of their overall viewing time than ever before, and importantly a larger opportunity for advertisers to reach their consumers. And by being on the same physical screen as Linear TV, CTV offers the high-impact, high-attention, storytelling power that advertisers are familiar with from a TV campaign. And of course, viewers don't know the difference!



And where the eyeballs go, the ad dollars follow! BVOD, AVOD and FAST have been an integral part of connecting advertisers to their customers on CTV, and now that the SVOD players have introduced their ad-funded tiers, the opportunity has grown even bigger, but become more complex. (And with fragmentation comes complexity)

02 The challenge & opportunity of CTV advertising

Ultimately, these viewing trends mean that advertisers have more opportunity than ever to engage with their consumers on CTV.

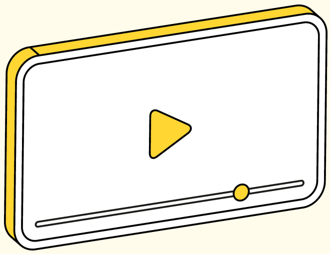
Combine this with the **targeting capabilities** and **measurement solutions** that CTV has to offer, and it means we can be more effective at reaching our desired target audience, gain a better understanding of how well our campaigns are working, and ultimately use this to deliver more effective campaigns and maximise return on investment.

So What's the Down Side?

The fragmentation of the TV landscape across numerous linear and digital content providers presents a significant challenge. While Total TV consumption is up, audiences are dispersed across more services, creating silos. CTV requires a holistic approach to break through these silos and capitalise on the advanced targeting & measurement capabilities. But obviously there is no one complete solution or all encompassing ecosystem to this that exists in market - that would be too easy.

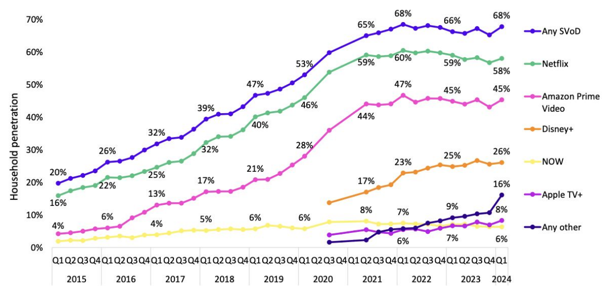
The future of effective CTV campaigns lies in consolidating these fragmented ecosystems. While some publishers (like YouTube, Amazon Prime Video & ITV) remain within their proprietary platforms, others are increasingly offering programmatic access - and this is where the opportunity to consolidate lies.

To do this, we need to understand which services and DSPs offer the best access & capabilities, which publishers are integrated, and how to best leverage these combinations for optimal results.



The CTV landscape is fragmented

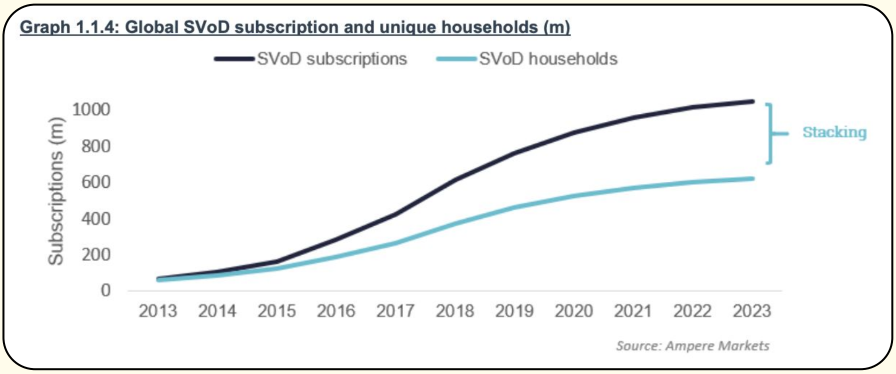
Figure 16: SVoD penetration of UK households, by provider: Q1 2015 to Q1 2024



Source: OfCom Media NAtions Report 2024

Household penetration of SVOD providers is increasing, and more and more partners are entering the market. The more recent launch of their ad-funded tiers has been a game changer, and as user volumes behind them scale, this provides a huge opportunity for advertisers to engage with them in high-attention environments.

And people dont have just one streaming service



But users are increasingly splitting their attention across multiple providers & services, as they prioritise content and choice. This means that although the opportunity is growing rapidly, so is the fragmentation of where our audiences spend their time.

Despite the fragmentation, the combined reach of significant CTV publishers can surpass traditional TV – ***The key challenge lies in unifying these publishers***

03 *Consolidating the silos:* ***Our path to Unified CTV***

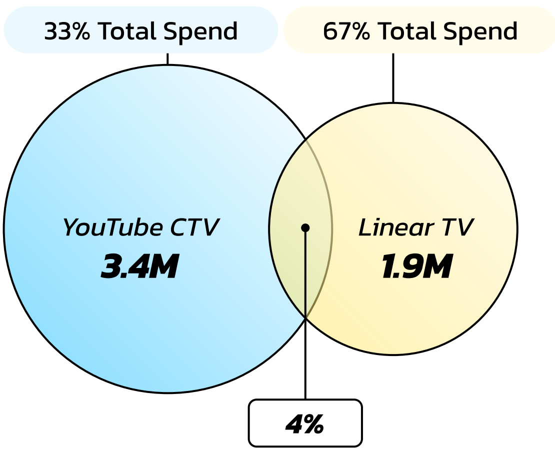
This paper explores how advertisers can break through CTV silos for a unified approach. For the past two years, we've rigorously tested various CTV publishers, gaining valuable insights into CTV performance & delivering strong results, even within the fragmented ecosystem!

And our testing has seen great results:

*#1 Agency for dedicated CTV spend 2023**

**Proportional spend, amongst peer set*

XMR Case Study



From our Cross Media Reporting, we have proven that we can reach targeted audiences more effectively with CTV partners

Lift Study Results

- Ad- Recall
- Consideration
- Search Lift
- Awareness
- Purchase Intent

Our CTV campaigns have consistently delivered strong lift results - positively influencing audiences through the funnel, even within a fragmented ecosystem

YouTube NETFLIX Disney+ prime video

Selection of core testing partners across various buying platforms

But now we're ready to connect these pieces, starting with DV360. Why DV360? The scale and sophistication of YouTube on CTV, integrated into the full funnel, provides a strong base for further CTV exploration. Adding to that, DV360's recent advancements in publisher integration including cross-publisher frequency capping, and its roadmap for consistent audience definitions & holistic lift studies, make it the ideal focus for this whitepaper series.

Now, to break through these silos, the power lies in applying a frequency cap to the audience and not the platform. This allows us to balance the relative cost & the reach of publishers within the CTV environment so that we can maximise/optimise reach and frequency for our desired audience - Something, that despite the best efforts of the broadcasters, can still not be done today.

Our vision is a unified ecosystem: one campaign, one platform, one audience definition, seamlessly running across AVOD, BVOD, FAST & SVOD.

But we know we need to test our way there....

*And the first thing we want to test: **Does frequency capping even work?***

04 So how did we test this?

Fresh off the back of the UK Netflix integration into DV360, and some successful initial proof of concept testing of this with Netflix, we were provided with an opportunity to run an awareness campaign for an advertiser whose brand ambassador aligned to an impending Netflix original content release.

Previous Netflix Testing:

+17%	Brand Awareness
+15%	Brand Favorability
+16%	Consideration

This gave us the chance to deliver a high-attention brand moment in line with the content launch on Netflix, but to use YouTube to extend that reach and build frequency against our core target audience. Optimising between the two, across one consolidated buy, and all frequency capped!

Exciting stuff, hey?

05

But what did we want to learn?

Well it's simple. Now that we have our vision of a unified ecosystem, and a holistic approach across this, our campaign provided us with the opportunity to test Netflix as the first integrated SVOD partner in this. So what we wanted to learn was:

Does Frequency Capping actually work across Netflix & YouTube?

Not only does it work, as in, "does the technical integration work", but does it work in its ability to balance the relative cost and reach opportunities between YouTube and Netflix.

And why is that important? Well, if frequency capping works between these two publishers, in one environment, we know we can consistently identify our audience across both, and crucially, optimise between the two to maximise our reach effectiveness efficiently.

You can do this with modelled identifiers and geo level data to provide a decent view, but it doesn't give the level of granularity that we wanted to prove our hypotheses and deliver our vision.

06

And did it work?

In a nutshell - YES! The campaign was a roaring success.

Search Lift

342% *Product Search Lift*

Brand Recall

113,000 *Lifted Users*

The campaign completely outperformed all of our targets and benchmarks when it comes to Brand Recall & Search Lift (which were the two key Brand indicators we were aiming for in this campaign)

And the Frequency Capping worked too:

+51%

Total Reach vs. Target

386,687

Added reach from frequency capping

Due to our frequency capping, we comfortably beat our total reach target. We were able to harness the added reach offered by multiple publishers, but prevent the usual wastage you would get by running in silo (whether this be on Linear or CTV). The frequency cap allowed us to manage that overlap, and identify the most cost effective routes to delivering our target reach & frequency across the campaign!

And the really interesting point is, as a result of this, and by reinvesting the budget we would have spent on that overlap, we were able to deliver an **incremental 386k+ reach** against the desired audience in this campaign - which you could not have achieved in silo!

But it doesn't end there...

07 We used Frequency Capping to optimise our campaign mid-flight

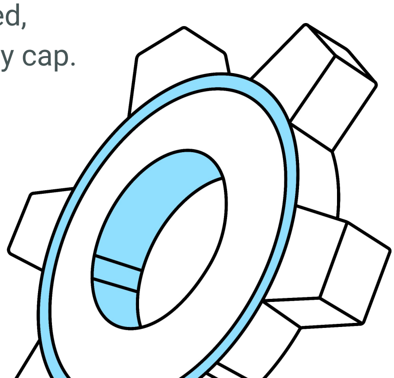
Because, at Brainlabs, we relentlessly look for the highest performance in everything we do, mid-campaign we did some digging. We identified from our live Brand Lift study, that there was a particular demographic that was responding best to our campaign.

We decided to test how we could focus our campaign on this audience, and use our frequency capping to maximise our incremental reach against that specific audience. The theory being, if this audience are responding best to our advert, the more of them we reach, the more our brand metrics will increase.

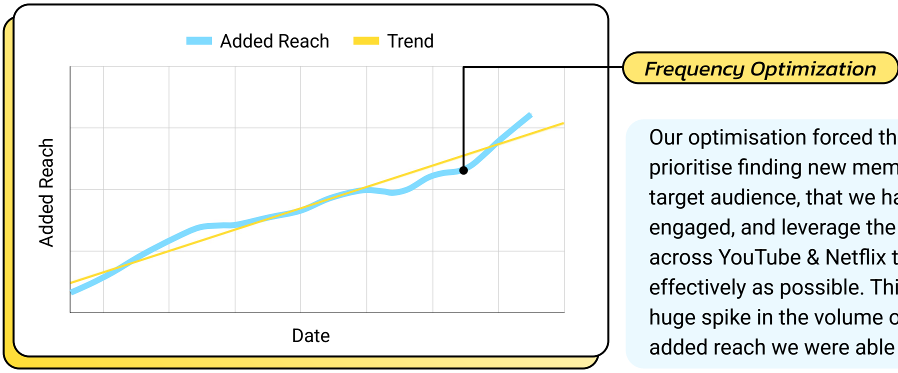
So we narrowed our targeting (to isolate this audience), we tightened our frequency (to the average level we were seeing deliver these brand results), we pulled some other in-platform levers, and we crossed our fingers. The theory was solid, but we have never been able to optimise a TV campaign like this mid-flight before. And the campaign was already performing so well, so we didn’t want to negatively impact our first consolidated test with Netflix.

Whether it was due to excitement, or nerves, we spent the following days monitoring this closer than ever, with regular early morning or late evening slack messages being exchanged like “Frequency is holding strong at 1.8”, or “Pacing picking back up!!!”.

And to our delight, our optimisation worked, and it was made possible by the frequency cap.

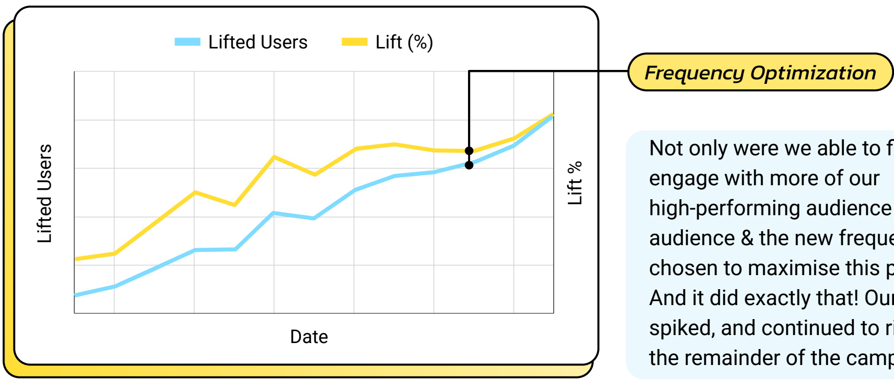


Incremental Added Reach



Our optimisation forced the platform to prioritise finding new members of our target audience, that we had not yet engaged, and leverage the opportunities across YouTube & Netflix to do this as effectively as possible. This led to a huge spike in the volume of incremental added reach we were able to deliver.

Ad Recall



Not only were we able to find and engage with more of our high-performing audience - but this audience & the new frequency cap were chosen to maximise this performance. And it did exactly this! Our ad recall spiked, and continued to rise throughout the remainder of the campaign.

This unified CTV test in DV360 allowed us to not only prove that frequency capping works, but that the frequency capping has allowed us to tap into the power of the advanced **targeting** and **measurement** available to CTV that Linear TV doesn't have.

We utilised live Brand lift results (measurement), responded to this by isolating a high performing audience (targeting), and maximised our incremental reach of them through a frequency cap - **you can't do that on Linear TV!**

08 So what did we learn about Unified CTV?

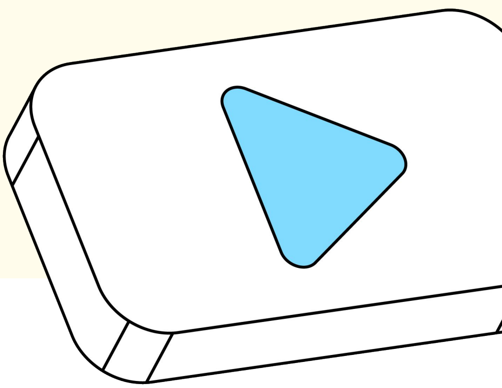
We learned that Holistic / Unified CTV buys work.

Frequency Capping = Incremental reach & effective buys

The ability to frequency cap between multiple publishers reduces the uncontrolled overlaps and allows us to focus budget to maximise reach of our target audience. Basically, it means we can reach more or the right people with the same budget!

Frequency Capping = Unlocks the power of digital targeting & measurement

Frequency capping also allows us to respond to the live performance insights we receive from holistic CTV campaigns, and focus our advertising on the audience to the degree that will maximise campaign success.



And what's

Coming Next ?

As more and more publishers are integrated into buying platforms, and the platforms expand their functionality with these partners, our opportunity to deliver a Unified CTV campaign becomes more and more exciting.

DV360 in particular is introducing consistent audience definitions across publishers (through google audiences), and consistent Brand Lift studies through Google BLS - so our testing roadmap includes:

Publisher expansion: What is the optimal mix of AVOD, SVOD, BVOD & FAST partners for reaching our target audiences efficiently and effectively?

Singular audience definition: Can a consistent audience definition in Google Audiences lead to more predictable and scalable results across partners?

Holistic, in-platform Brand Lift Studies: How does brand lift vary across different CTV services & content types, and how do they contribute to the overall campaign?

Each of these will help us get closer to our vision, and our ability to run multi-publisher, Connected TV campaigns. We truly believe that programmatically bought TV campaigns are the present & the future. Not only as an easier entry point for advertisers into the TV space, but as a modernised, targeted, accountable & effective channel to drive Big Brand Objectives.

Insights provided by:

Alex Glover
Managing Director, Programmatic

Nathan Ridout
Senior Account Manager, Programmatic