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Now Tech: Omnichannel Media Management, Q2 2019

Tools And Technology: The Omnichannel Advertising Playbook

by Joanna O’Connell

June 14, 2019

Why Read This Report

An omnichannel media management approach can improve business performance, boost operational efficiency, and deliver better consumer experiences. But to realize these benefits in today’s fragmented advertising tech platforms market, you must select from vendors varying in size, functionality, geography, and vertical market focus to construct your own omnichannel stack. B2C marketers, use this report to learn the value you can expect from omnichannel media management platform providers and to select yours based on size and functionality.

Key Takeaways

Improve Ad Relevance And Performance With Omnichannel Media Management
Marketers should pursue a more omnichannel approach to media management. By simplifying their advertising technology (adtech) stack to include fewer players, marketers will realize performance and operational benefits and deliver better consumer experiences.

Select Vendors Based On Size And Functionality
Marketers should look at omnichannel media management tech through the lens of vendors’ market presence and specific functional expertise.

Construct Your Ad Stack To Be As Simple And Complete As You Need
Use your advertising strategy to guide your approach to omnichannel media management, with an eye toward simplicity and completeness.

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Now Tech: Omnichannel Media Management, Q2 2019

Tools And Technology: The Omnichannel Advertising Playbook

by Joanna O'Connell
with Brigitte Majewski, David Novitzky, and Christine Turley
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Table Of Contents

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Gain Relevance And Performance With Omnichannel Media Management

In the age of the customer, earning a consumer's attention and favor through advertising is more challenging than ever.[1] And yet, savvy brands know that advertising *can* serve as a critical business engine.[2] For B2C marketers to maximize the value of every ad dollar invested *and* actively deliver relevant advertising experiences, they must start thinking and acting in a more omnichannel way — where consumer experience, not channels or buying modalities such as programmatic or traditional insertion order-based, drives every strategy, data, and technology decision.

Forrester defines omnichannel media management as:

> *Holistically planning, buying, optimizing, and generating insights across all paid media touchpoints and buying modalities to deliver relevant, connected advertising experiences to consumers throughout the purchase life cycle.*

Managing media across channels is complicated: Marketers *need* technology to support their omnichannel media management efforts. But they shouldn't need unnecessarily complex, fragmented adtech stacks to get there; there are myriad benefits to using fewer separate adtech platforms for planning, buying, and optimizing media across channels, formats, and devices. With a streamlined media management stack, marketers can:

› **Improve media performance.** Cross-channel adtech platforms often offer features like cross-channel budget fluidity and optimization to maximize the value of every dollar spent. Features like holistic frequency management better control for ad frequency delivery across (rather than just within) channels and reduce media waste.[3]

› **Realize operational efficiency.** Each adtech platform in a brand's stack needs an expert to run it, whether internal or external. And people cost money. Brands can reduce headcount load and training time to improve operational efficiency by selectively reducing the number of platforms they work with without unduly sacrificing channel access or functionality.[4]

› **Deliver better consumer experiences.** Adtech platforms that span channels often include features to manage consumers' experiences across them: Synced and/or sequential messaging capabilities let brands tell stories across multiple channels, such as by delivering identical ads designed to reinforce a given message or by sequencing an unfolding story.

Select Vendors Based On Size And Functionality

We've based our analysis of the omnichannel media management market on two factors: market presence and functionality.

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Omnichannel Media Management Market Presence Segments

We segmented the vendors in this market into three categories based on omnichannel media management revenue: large established players (more than $1 billion in omnichannel media management revenue), midsize players ($100 million to $1 billion in revenue), and smaller players (less than $100 million in revenue) (see Figure 1). We did not include vendors that we estimated to have less than $4 million in revenue.

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FIGURE 1 Now Tech Market Presence Segments: Omnichannel Media Management, Q2 2019

NOW TECH

Omnichannel Media Management

Q2 2019

LARGE >$1B in annual category revenue

Amazon*	**Google***
Criteo	**Verizon Media**
Facebook*	**Xandr**

MIDSIZE $100M to $1B in annual category revenue

[24]7.ai*	**Conversant***
Adform	**DataXu**
Adobe	**Kenshoo**
Amobee	**MediaMath**
Centro	**The Trade Desk**

SMALL <$100M in annual category revenue

4C Insights	**IgnitionOne**
Albert	**Marin Software**
Beeswax	**Nanigans***
Brand Networks*	**VideoAmp***

*Forrester estimate

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Omnichannel Media Management Functionality Segments

Omnichannel claims aside, we found a market that is still siloed — primarily by channel — where vendor capabilities are often particularly strong in, if not outright limited to, one or two primary advertising channels. However, many vendors, regardless of their genesis, are moving toward omnichannel advertising, offering more cross-channel solutions to increase their attractiveness to prospects looking for more complete solutions and to ensure existing client stickiness through broader offerings. To explore functionality at a deeper level, we broke down the market into four segments, each with varying capabilities (see Figure 2 and see Figure 3):

› **DSPs are one-stop shops for cross-channel programmatic advertising.** Demand-side platforms' (DSPs') roots are firmly planted in display advertising, where programmatic got its start. But today, programmatic represents 64% of US digital ad spend (excluding social and search) and DSPs continue to expand upward and outward in terms of capabilities and channels supported. They offer inventory discovery and planning tools, support direct buyer/seller transactions, enable audience segmentation, and are lighting up newer programmatic channels like native, digital-out-of-home, and over-the-top (OTT).

› **Cross-channel video platforms are tackling the "television" question in different ways.** They aim to help brands wrangle their ad spend across traditional and emerging forms of sight, sound, and motion advertising, which will reach $103 billion in the US by 2023.[5] But vendor approaches vary: Some are modernizing traditional broadcast television through new planning, inventory discovery, and audience segmentation tools as part of their cross-channel video play, while others show their digital DNA by tackling the cross-channel video question via digital video and OTT (which, while relatively small today, is increasing rapidly).[6]

› **Social-led ad platforms simplify cross-platform social advertising.** Social-led ad platforms have their genesis in the social advertising space, helping marketers manage and consolidate myriad paid social environments by offering streamlined workflow across paid social platforms in the form of cross-network ad buying, optimization, and reporting. While social-led ad platforms are expanding their offerings to include other paid channels like paid search and/or programmatic digital advertising, their social roots and focus remain strong, making them valuable to buyers with a diverse social advertising strategy.

› **Search-led ad platforms help wrangle marketers' search advertising efforts.** As search remains a core paid channel for many brands, these platforms play a critical role in the construction of an omnichannel adtech stack. But several have also moved into adjacent areas like programmatic digital advertising for both strategic reasons and out of necessity: It makes them likelier to appeal to clients looking for broader performance marketing solutions, and it helps future-proof them as paid search advertising spend stagnates. Amazon is the new wild card entrant in this space, offering both search and display ad buying.[7]

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FIGURE 2 Now Tech Functionality Segments: Omnichannel Media Management, Q2 2019, Part 1

	Demand-side platforms	Cross-channel video platforms
Media planning	Moderate	Moderate
Programmatic buying	High	Moderate
Non-programmatic buying	Moderate	Moderate
Media billing/reconciliation	High	High
Reporting and insights	High	Moderate
Channel: paid search	Low	Low
Channel: paid social	Moderate	Low
Channel: display and native	High	Low
Channel: digital other (e.g., DOOH, audio)	Moderate	Low
Channel: video (desktop/mobile)	High	High
Channel: OTT/CTV	Moderate	High
Channel: linear broadcasting	Low	Moderate
Channel: addressable TV	Low	Moderate
Channel: traditional other (e.g., print, audio, OOH)	Low	Low
Ancillary functionality (e.g., ad serving, creative adtech, DMP, identity)	Moderate	Moderate

Segment functionality None Low Moderate High

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FIGURE 3 Now Tech Functionality Segments: Omnichannel Media Management, Q2 2019, Part 2

	Search-led ad platforms	Social-led ad platforms
Media planning	Moderate	Moderate
Programmatic buying	High	Moderate
Non-programmatic buying	Moderate	Low
Media billing/reconciliation	High	High
Reporting and insights	High	High
Channel: paid search	High	Moderate
Channel: paid social	Moderate	High
Channel: display and native	Moderate	Moderate
Channel: digital other (e.g., DOOH, audio)	Low	Low
Channel: video (desktop/mobile)	Moderate	Moderate
Channel: OTT/CTV	Low	Moderate
Channel: linear broadcasting	Low	Moderate
Channel: addressable TV	Low	Low
Channel: traditional other (e.g., print, audio, OOH)	Low	Low
Ancillary functionality (e.g., ad serving, creative adtech, DMP, identity)	Moderate	Moderate

Segment functionality None Low Moderate High

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Align Individual Vendor Solutions To Your Organization's Needs

The following tables provide an overview of vendors with details on functionality category, geography, and vertical market focus (see Figure 4, see Figure 5, and see Figure 6).

FIGURE 4 Now Tech Large Vendors: Omnichannel Media Management, Q2 2019

LARGE >$1B in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (top three by revenue %)	Sample customers
Amazon	DSP; search-led ad platform	NA 75%; Other 25%*	Consumer electronics; CPG; retail*	Vendor did not disclose
Criteo	DSP	EMEA 36%; AP 22%; Other 42%	Retail; travel	Greg Norman Collection; La Redoute; Reebok
Facebook	Social-led ad platform	NA 48%; EMEA 25%; AP 17%; Other 10%*	CPG; retail; financial services*	Vendor did not disclose
Google	DSP; search-led ad platform	NA 60%; LATAM 15%; EMEA 15%; AP 10%*	Financial services; retail; travel*	Vendor did not disclose
Verizon Media	DSP; cross-channel video platform	NA 80%; Other 20%*	Financial services; tech; retail	Coca-Cola; General Mills; Kellog's
Xandr	DSP; cross-channel video platform	NA 90%; Other 10%*	CPG; telco*	Air France; Amnet; GroupM

*The vendor did not provide information for this cell; this is Forrester's estimate.

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FIGURE 5 Now Tech Midsize Vendors: Omnichannel Media Management, Q2 2019

MIDSIZE $100M to $1B in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (top three by revenue %)	Sample customers
[24]7.ai	Search-led ad platform; social-led ad platform	NA 90%; EMEA 5%; AP 5%	CPG; financial services; ad agencies	Metlife; Transunion
Adform	DSP; cross-channel video platform	NA 11%; LATAM 2%; EMEA 79%; AP 8%	Automotive; telco; financial services	BMW; Coty; Vodafone
Adobe	DSP; cross-channel video platform; search-led ad platform	NA 57%; EMEA 28%; AP 15%	Retail; CPG; financial services	Dell; Dollar Shave Club; ServiceNow
Amobee	DSP; cross-channel video platform	NA 82%; EMEA 6%; AP 12%	CPG; automotive; retail	Kraft; Molson Coors; Toyota
Centro	DSP; cross-channel video platform	NA 98%; LATAM 1%; EMEA 1%	Health; law and government; retail and commerce	Casual Astronaut; Norbella; VI Marketing and Branding
Conversant	DSP	NA 93%; EMEA 7%	Retail; financial services; automotive	Banana Republic; Signet; Swanson Health
DataXu	DSP; cross-channel video platform	NA 86%; EMEA 8%; AP 6%	Media agency; automotive; retail	Horizon; Lexus; Sky
Kenshoo	Search-led ad platform; social-led ad platform	NA 79%; LATAM 6%; EMEA 12%; AP 3%	Retail and eCommerce; travel; financial services	LendingTree; Macy's; Shutterfly
MediaMath	DSP; cross-channel video platform	NA 75%; LATAM 5%; EMEA 14%; AP 6%	Retail; professional, scientific, and technical services; telco	CBSi; Havas; Jet.com
The Trade Desk	DSP; cross-channel video platform	NA 70%; LATAM 2%; EMEA 20%; AP 8%*	CPG; food and drink; automotive	Diageo; P&G; Samsung

*The vendor did not provide information for this cell; this is Forrester's estimate.

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FIGURE 6 Now Tech Small Vendors: Omnichannel Media Management, Q2 2019

SMALL <$100M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (top three by revenue %)	Sample customers
4C Insights	Social-led ad platform; cross-channel video platform	NA 69%; LATAM 1%; EMEA 25%; AP 5%	Entertainment and media; retail and eCommerce; CPG	Dyson; General Mills; Walgreens
Albert	DSP; search-led ad platform; social-led ad platform	NA 45%; LATAM 5%; EMEA 10%; AP 40%	Telco; retail and eCommerce; CPG	AIG; Pepsi; Vodafone
Beeswax	DSP	NA 85%; EMEA 15%	Media and telco; technology; marketing services	Dailymotion; Foursquare
Brand Networks	Social-led ad platform	NA 85%; Other 15%*	Retail; CPG; entertainment	Vendor did not disclose
IgnitionOne	DSP; cross-channel video platform	NA 91%; LATAM 2%; EMEA 6%; AP 1%	Retail; travel and hospitality; auto	Lowe's; Mitsubishi; Wyndam Worldwide
Marin Software	Search-led ad platform	NA 76%; LATAM 0.5%; EMEA 20%; AP 3.5%	Retail; technology; B2B services	Buyagift; Nissan; Path Interactive
Nanigans	Social-led ad platform	NA 80%; Other 20%*	eCommerce; lead gen; gaming	Dashlane; Rue la la; Wayfair
VideoAmp	Cross-channel video platform	NA 100%	Entertainment; finance services; pharma	Mindshare; Omnicom Media Group; Spark Foundry

*The vendor did not provide information for this cell; this is Forrester's estimate.

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Recommendations

Construct Your Ad Stack To Be As Simple And Complete As You Need

Your prospects and customers deserve relevant, connected advertising experiences. But there is no one-stop shop adtech platform for omnichannel media management, at least today. The reality is, you're likely going to need multiple platforms to achieve your version of omnichannel media management even if you choose a primary vendor to manage many core ad channels. So it's incumbent upon you and your team to construct a technology stack that maximizes value and minimizes redundancy or waste — this applies to both the tech and the people who use it. Let your ad strategy serve as your North Star in your efforts: Who are you going after, what do you need to do to reach them, and what would an ideal omnichannel advertising experience look like today and in the future? This should dictate the channels and approaches you need to prioritize in constructing your ideal version of omnichannel media management. With that in mind:

› **Prioritize consumer experience over everything else.** It's time to acknowledge that consumers aren't very happy with advertising these days, nor with the fact that their data powers it. In 2019, only 42% of US online adults think advertising is a good way to learn about new products, and just 14% of them say they are willing to share personal information to receive more relevant advertising from companies.[8] That's a problem every brand should care about and work to ameliorate to protect media performance and brand health in the short and long term. Brands should do the obvious things like vet current and potential partners' data collection practices and policies. But they must also start to prioritize the less obvious: enabling consumer choice, transparency, and control.[9]

› **Take stock of your current vendors' capabilities and the org model that supports them.** You may already have adtech in place that could help you start connecting channels and not even know it. For instance, look at your search platform to see if offers some basic programmatic capabilities — if you're new to programmatic or only have moderate spend there, you may not need a sophisticated (and separate) DSP. This also means looking at your people: You may find you've got two departments (in this example, a search team and a programmatic team) using separate vendors when you could consolidate to one vendor across them.

› **Do an ROI analysis to weigh a best-of-breed versus consolidated approach.** The age-old question — should I use one vendor who has many solutions or many vendors with a single best-of-breed solution — comes up time and again in our conversations with marketers. The real answer is, it depends. So consider factors like these whenever you're weighing a decision: the people (and associated cost) required to develop expertise and manage the platform(s) in question; engineering requirements for connecting disparate technologies; and data requirements for translating or normalizing data sets. And then bump those considerations up against the expected performance upside of individual best-of-breed tech platforms versus any potential performance tradeoff of a consolidated approach.

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› **Don't let the walled gardens dictate your advertising approach.** The walled gardens — Google and Facebook most notably — continue to take the lion's share of digital ad spend.[10] And yet they command less than 50% of consumers' time online.[11] Recognize that even the best efforts to deliver a connected advertising experience remain hampered by the rules and restrictions — like sharing use-level performance data in Facebook's case or restricting YouTube access to Google's adtech stack — that these ad behemoths have in place. Brands have two options here. The first is to push for change: Pursue a "clean room" solution to access the data necessary for more holistic and relevant omnichannel audience targeting and measurement.[12] The second is to pull back or even walk away: Take stock of your target prospects' and customers' media consumption to ensure your approach matches their behavior — you may find they're not spending time where you think they are.

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Supplemental Material

Market Presence Methodology

We defined market presence in Figure 1 based on factors such as revenue size, number of enterprise customers, and number of employees.

To complete our review, Forrester requested information from vendors. If vendors did not share this information with us, we made estimates based on available secondary information. We've marked companies with an asterisk if we estimated revenues or information related to geography or industries. Forrester fact-checked this report with vendors before publishing.

Forecast Methodology

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Companies Interviewed For This Report

We would like to thank the individuals from the following companies who generously gave their time during the research for this report.

[24]7.ai

4C Insights

Adform

Adobe

Albert

Amobee

Beeswax

Centro

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Conversant

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Marin Software

MediaMath

Sizmek

The Trade Desk

Verizon Media

VideoAmp

Xandr

Endnotes

[1] See the Forrester report "The Future Of Omnichannel Advertising Must Be Customer Obsessed."

[2] Source: Joanna O'Connell, "TD Ameritrade's 'Accountable CMO' Makes Marketing A Business Engine," Forrester Blogs, May 3, 2018 (https://go.forrester.com/blogs/td-ameritrades-accountable-cmo-makes-marketing-a-business-engine/).

[3] Marketers use multiple vendors to target the same audiences, which wastes media dollars and drives up the actual cost of placing media when these vendors bid against each other. Additionally, those who use multiple tech platforms using algorithms rooted in statistical inference reduce the amount of data each algorithm can use, which hurts auto optimizations. See the Forrester report "Create An Omnichannel Advertising Strategy Centered On Customer Experience."

[4] "We see value in consolidating from a cost standpoint, and we see it in [developing] a great relationship with a vendor," noted an agency executive interviewed. See the Forrester report "The Forrester Wave™: Creative Advertising Technologies, Q4 2018."

[5] This includes traditional television advertising and online video advertising, including on social networks. See the Forrester report "Forrester Analytics: Video Advertising Forecast, 2018 To 2023 (US)."

[6] OTT growth can be demonstrated by Hulu, which grew its US ad revenue year-over-year in 2018. Source: Todd Spangler, "Hulu Tops 25 Million Subscribers, Claims Nearly $1.5 Billion in 2018 Ad Revenue," Variety, January 8, 2019 (https://variety.com/2019/digital/news/hulu-25-million-subscribers-2018-ad-revenue-1203102356/).

[7] Amazon raked in $10 billion in ad revenue in 2018. Amazon discloses ad revenue as "Other" in its financial statements. Source: Taylor Soper, "Amazon's big new business: Here's how much advertising revenue the company generated in 2018," GeekWire, January 31, 2019 (https://www.geekwire.com/2019/amazons-big-new-business-heres-much-advertising-revenue-company-generated-2018/).

[8] Source: Forrester Analytics Consumer Technographics® North American Online Benchmark Survey (Part 2), 2019.

[9] Adtech platforms can help — brands can A/B test things like "level of message personalization" relatively quickly and simply. There are also new offerings on the market from companies like Dabbl that explicitly enable consumers to choose the ads they interact with. Source: Anthony Ha, "With Dabbl, you can earn gift cards for interacting with ads," TechCrunch, November 21, 2017 (https://techcrunch.com/2017/11/21/with-dabbl-you-can-earn-gift-cards-for-interacting-with-ads/).

[10] See the Forrester report "Forrester Analytics: Digital Marketing Tracker, Q3 2018."

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[11] A Pivotal Research review of Nielsen digital consumption data indicated that Google properties combined accounted for 27.4% of all time spent on digital media and Facebook's share of time accounted for 16.3% over the same period. Source: "Users Are Now Spending More Time on Google's Properties Than Facebook, Data Shows," Fortune, April 11, 2018 (http://fortune.com/2018/04/11/google-youtube-facebook-nielsen/).

[12] Source: Seb Joseph, "WTF is a data clean room?" Digiday, March 1, 2019 (https://digiday.com/marketing/data-clean-room/).

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