



Connected TV Signal Standardization Initiative



October 2021



Omnicom Media Group Issues Call-to-Action for Industry Adoption of CTV Standards

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Executive Summary

OMG is leading the industry in ConnectedTV (CTV) by encouraging the entire community to join OMG in a collaborative initiative to set a baseline definition of practices, protocols, and solutions to improve the CTV environment. The ConnectedTV Signal Standardization Initiative (CTV-SSI) is centered around 3 types of buying signals: Inventory, Identity, and Fraud. The improvement and standardization of these signals will help facilitate an increase and spend in this environment and provide advertisers with a viable path to re-allocate budgets, such as from TV.

Introduction

Over the past year the combination of increased accessibility to internet-enabled TVs and pandemic-driven shifts in media consumption helped drive record growth in CTV investments. In the US, 2020, CTV ad spend increased 40.6% year-over-year - to more than \$9 billion - making CTV the fastest growing sector of the US digital ad market. That growth rate is expected to further accelerate in 2021, closing on in 50% with a projected spend of \$13.41 billion.

OMG has led the growth of this space. We have made significant investments in the environment and engaged with platforms, publishers, and providers to create standardized solutions. We expect that over the next year, video and TV budgets across the industry will favor environments a greater standardization and clarity of signals.

However, this growth has not been without challenge. Many sellers do not provide the same level of inventory transparency that they do in linear buying, CTVs distribution model has fragmented the identity signal into several walled-gardens, and cyber criminals have taken advantage of the environments lack of measurability to generate millions in ad fraud. While some providers have innovated to try and offer solutions to these issues, these problems remain prevalent, and a lack of standardization remains a core obstacle to the future of CTVs growth.

Distorted Signals

The media world operates on a series of signals that vary based on the channel and environment. Over time, the signals used to buy media have become more granular and sophisticated. New signals have popped up, such as the ability to identify audiences based on interests rather than demographics. Additionally, signals have improved over time such as the TV world's ability to go from Live to Live+3 ratings. However, what is true of the past is not always true for the future. Over the last year, we've seen

some signals regress or outright deprecate, such as with the recent phasing out of cookies and app identifiers by regulators and platforms alike.

The rest of this will zone in at a high level on 3 types of signals: Inventory, Identity, and Fraud. All 3 are critical to ensuring that buyers know what they're buying, who they are delivering messages to, and trust that their dollars are going into the right hands. Doing this in a privacy safe manner that puts the consumer experience first will create a better long-term solution to the industry's biggest gaps. Intelligent sellers will innovate here not purely for philosophical or altruistic reasons. Intelligent companies that innovate in these areas know that bringing standardization to the market will earn them bigger budgets and a driver seat in the largest growing channel in media.

Inventory Signals – Standardizing the Nutrition Label

The first of three signals we're going to look at is the Inventory Signal. Simply, buyers need to understand what they are buying more granularly. As more budgets come from TV, where buyers negotiate on specific timeslots, down to the show level, pod level, and even position in pod, they'll expect to see similar signals available to them when trying to access the same content from the same sellers digitally. Instead, they find that inventory signals are missing critical pieces information, heavily obfuscated, and non-standardized across different partners.

Most of the work here is already laid out by the IAB in the newest RTB protocols and taxonomies. IAB has already created the content object in recent RTB protocols that allows publishers to declare specific show, genre and other show level information and standardized the fields through their [content taxonomy 3.0](#) release.

Further, the need for third parties to review and verify this information will be a key step in ensuring both comparable experiences to Desktop and Mobile environments, protecting exclusive seller signals, and creating a trust framework between buyers and sellers.

Identity Signals – Protecting and Respecting Data Privacy

Next is the Identity signals in CTV. In Desktop and Mobile, the industry has rallied behind cross-platform identifiers. Originally the cookie and device ID but eventually turning towards privacy-safe alternatives such as Unified ID 2.0, which [Omnicom was the first holding company to publicly endorse](#). However, in CTV, platforms have siloed audiences and inventory into pseudo-walled gardens that are unwilling to collaborate out of fear of having their viewership data pilfered by buyers. The growing pressures of massive walled-gardens such as YouTube which has addressable audiences, content transparency, and brand safety guardrails will force others to collaborate as they do in other channels.

Households are a reasonable compromise that give buyers the ability to understand their reach in terms that can operate across platforms and channels while still protecting the individual and unique datasets that publishers build upon. This already happens in the linear world and thus, translating that into digital is a critical step to enable these channels to compete for TV budgets and those put with the digital giants of Facebook and YouTube.

Finally, many CTV signals today use IP-address as part of their solution. In order to future-proof the CTV identity industry and to respect the consumer's personally identifiable information, IP address data will need to be slowly phased out of the targeting and measurement markers used in today's system.

Fraud Signals – Illuminating the supply chain

Cyber Criminals have always flocked to new environments that lack standardization and measurement to fund their activities. From toolbars on browsers in the early 2000s, click fraud when google search went big, mobile fraud when the “year -- or decade -- of mobile” was growing, and now CTV are all examples of this. Eventually, the increased anti-fraud measures through the collaboration of devices, apps, sellers, and verification companies have illuminated the space and the cyber criminals have moved to other areas. With CTV, the fragmentation of the space and unwillingness to collaborate to remove fraud will hurt the ecosystems long term growth. The industry needs to adopt better authentication of devices and servers, track the origins of impressions, and integrate deeper anti-fraud telemetry data within CTV devices to identify and remove fraud at the core. This will create a safer environment that buyers will be able to tap into with more confidence that their dollar is not getting into the wrong hands.

Again, solutions are already emerging to facilitate this. [Ads.cert 2.0 was released](#) to authenticate connections between buyers and sellers and to standardize the declaration of participants in the auction. This is especially critical in CTV where the majority of inventory is sold ‘off device’ via Server-Side Ad Insertion (SSAI). Additionally, the IAB is also working on a CTV extension for OpenMeasurement SDK to allow for better measurability.

It will also require a higher level of collaboration with fraud detection companies to outside of the purely advertising space to increase the level of fraud telemetry available. This means anti-fraud SDKs with device manufacturer's, services and apps as well as device attestation protocols to verify that the impressions occurred on real TVs rather than server farms. Many verification companies are already working on these protocols and SDKs, but it will take an implementation across the ecosystem before cyber criminals begin to look elsewhere to fund their enterprise.

CTV Signal Standardization Initiative Highlights

We believe that, to promote the healthy growth of advertising ConnectedTV, the industry needs to agree to adopt certain standards, protocols, and frameworks. We are championing an improvement and standardization of Inventory, Identity, and Fraud signals. These measures are to provide a more transparent ecosystem, provide a better consumer experience, and mitigate fraud in one of the fastest growing environments in advertising. Platforms and companies that are working together to accomplish these goals will ultimately see increased confidence in their offering and increased investment from buyers bringing budgets into the space.

Inventory

Standardization of the nutrition label for CTV inventory

- Integration of show and placement level details including show, channel, genre into content objects in RTB protocol
- Standardized framework in RTB protocol to declare pod placement and position

- Collaboration with third parties verification companies to validate the ad content being sold
- Standardization of these metrics through governing body frameworks, such as the updated IAB's Content Taxonomy 3.0

Identity

Respect individual privacy and protect publisher data

- Translation of identity signals from individual to household in video
- Standardized process for partners to translate ID graphs to the household level
- Collaboration between buyers and sellers in data clean rooms to connect 1st party audiences
- Phase out of non-privacy safe identity signals, such as IP address

Fraud

Illuminating the supply chain

- Improved supply chain transparency and SSAI signatures through implementations of ads.cert 2.0
- Integrate ConnectedTV Open Measurement SDK to allow better measurement of the CTV landscape
- Collaboration between devices, platforms, and services on increasing fraud telemetry data such as Anti-Fraud SDKs and device attestation protocols