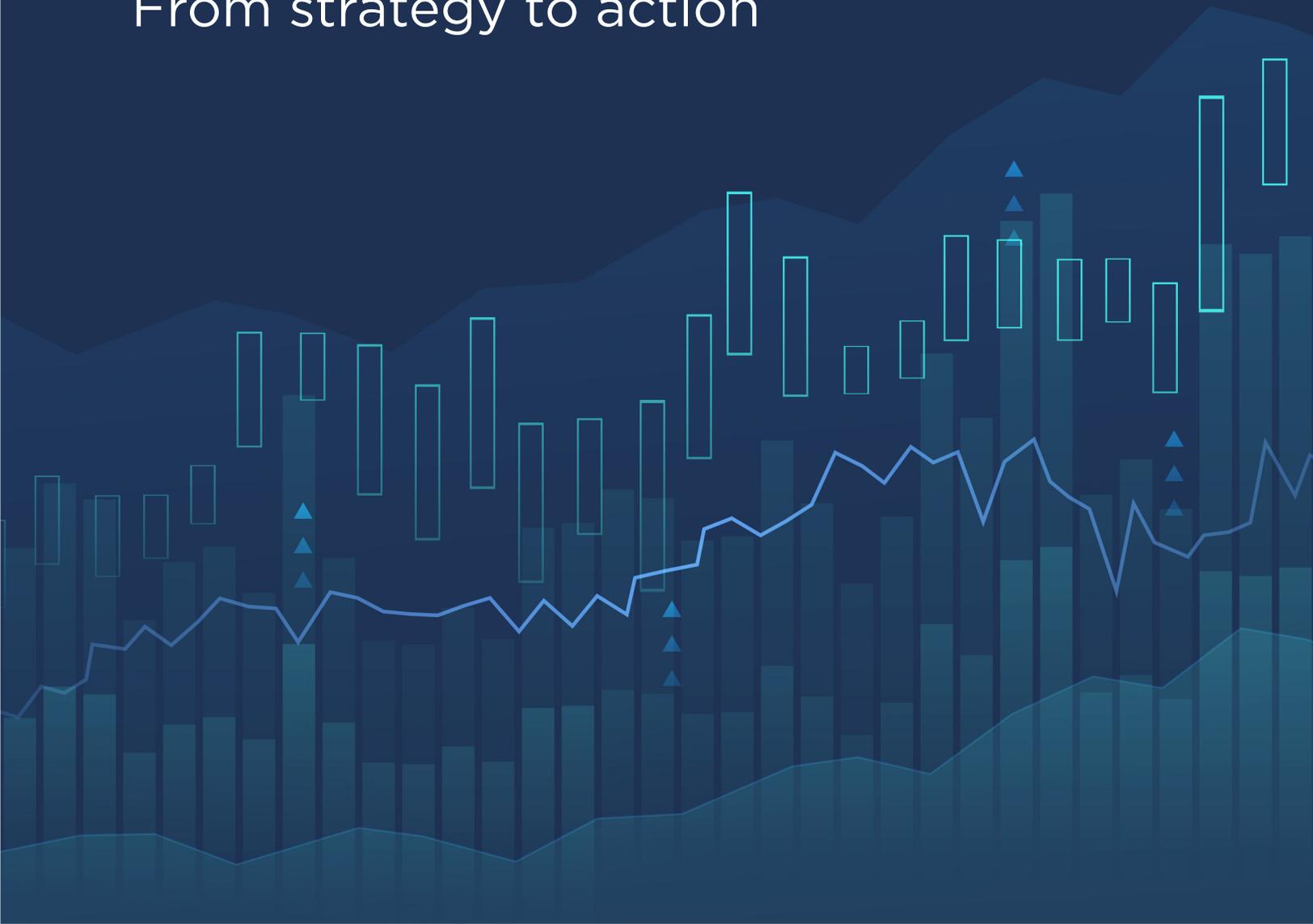


Investment Planning Playbook

From strategy to action





Are you ready for the future of investment planning?

Fragmentation, rising costs, and complexity are the biggest challenges for investment planning today. Those challenges are heightened by additional underlying hurdles that are both external and internal for investment planners. The explosion of content and places to view it have added multiple layers of complexity in finding target audiences. Siloed teams, siloed buying, and siloed budgets add even more friction to the process.

Technology is available that can help solve the problem of cross-screen planning. The solution needs to include a data-driven approach with a holistic allocation of reach and frequency across linear and digital properties. It also needs to manage CTV/OTT holistically and provide robust cross-screen reporting.

To find that solution, you need to ask the right questions about allocation, accurate audience unification, and more. There should also be an expectation, and proof, that your technology partner has experience supporting all of the essential aspects of planning, allocating, and optimizing your investments.

This playbook explores all of that and more and will show you how to get the most out of your investments by:

- ✓ Exploring the types of opportunities that technology offers.
- ✓ Helping you understand what to expect from a tech partner.
- ✓ Highlighting navigation paths through today's fragmented marketplace.



Challenges in a Complex Marketplace



A goal without a plan is just a wish.

- Antoine de Saint-Exupery



Understanding Market Challenges

With over 800,000 unique programs airing across linear, CTV, and an ever-growing number of streaming channels, fragmentation continues to increase¹. Consumers are in charge, and brands need to keep up with how they are consuming video, which is whenever and wherever they want. And even though 58% of consumers still watch premium video content on the big screen in their living room⁴, that no longer means they are watching just linear TV.

In fact, linear TV continues to see declining viewership. Loyal viewers still watch over 3 hours per day³, but during Q1 2022, 94% of all linear ad impressions reached the same 55% of TV viewers.²

So, how do advertisers find the audiences they need to reach? How do they deduplicate that audience across screens? How do they make consumers' viewing experience better so they are more receptive to ad messaging? How is that done in a strategic way that amplifies the value of media investments?

As media costs continue to rise, unlocking more value from investments is paramount. With an alphabet soup of puzzle pieces to put together, today's investment teams need to take high-level, strategic plans and make them work across the complicated media ecosystem. There is a necessity, and an urgency, to find new ways to navigate through these challenges.

¹ Nielsen State of Play Report, Feb 2022

² Samba TV's State of Viewership Report for Q1 2022

³ Insider Intelligence, April 2022

⁴ Statista <https://www.statista.com/statistics/784383/online-video-devices-in-the-us/>



Unifying Audiences

In addition to external challenges, there are internal challenges as well; the siloed expertise of the teams that work in video, with premium video buyers on one side and programmatic traders on the other.

To add to the complexity, CTV/OTT sits in the middle of these two worlds. Over half of premium digital video investments are bought directly, much of it bundled with linear TV during the Upfront. Legacy media companies that are trying to hold on to viewers and stay relevant are embracing their shiny new streaming offerings with even more original, premium content. According to eMarketer, this year's CTV spending is estimated to surpass six billion dollars.

And although more and more video investment teams include both linear and premium digital, there's no common platform for planning against these audiences. Without unified audiences and an understanding of deduplicated reach, investments are still siloed. So, even if it is the same person or team, if the audience being purchased is not unified or bought together across publishers/content providers then there is no holistic view of overall investments.

The Power of Data + Technology = **Unification & Optimization**



If you don't know where you are going,
you'll end up someplace else.

- Yogi Berra



Success Through Advanced Technology

Unlock silos and unleash value by unifying audiences and optimizing across screens

The answer to this complex planning scenario is simple: Start by unifying audiences across linear and digital, and buy accordingly. But, that is easier said than done.

As more brands and agencies seek value from an increasingly complex media ecosystem, there is growing recognition that advanced technology must play a significant role in the solution. Technology can help unravel the complexity and achieve more successful outcomes with improved insights, workflow, ROI, and improved viewer experiences.

Here is what advertisers and agencies need to help solve the media implementation puzzle:

- A sophisticated, data-driven approach to linear TV.
- Smarter allocation of reach and frequency across linear and digital screens.
- An advanced framework for planning and managing CTV/OTT investments holistically.
- A robust cross-screen reporting and analytics solution.



Data-Driven Planning

A sophisticated, data-driven approach to linear TV

Using a data-driven approach, advertisers are able to get more specific about defining and targeting audiences. By adding technology that streamlines and automates the process, advertisers get the scale and ease of execution necessary to take advantage of the data they have access to. Take it one step further and use those audiences across screens and you are getting very close to a holistic cross-screen plan.

Smarter allocation of reach and frequency across linear & digital screens

The most difficult problem to solve in data-driven planning in both linear and digital is the ability to identify overlapping reach. In order to better understand and manage reach and frequency, technology needs to be able to understand not only where users are being exposed across linear and digital screens, but also where they are being exposed across partners within the same environment.

Solving this reach problem is incredibly complex due to the difficulty in identifying individuals within households and the sheer number of possible reach combinations across linear unit allocations and digital impressions. Many technology partners can only help to identify audience index scores across partners or can report on reach/frequency after media runs. Instead, look for a technology partner that can help plan and predict reach/frequency against an audience at the unit level before a schedule starts.

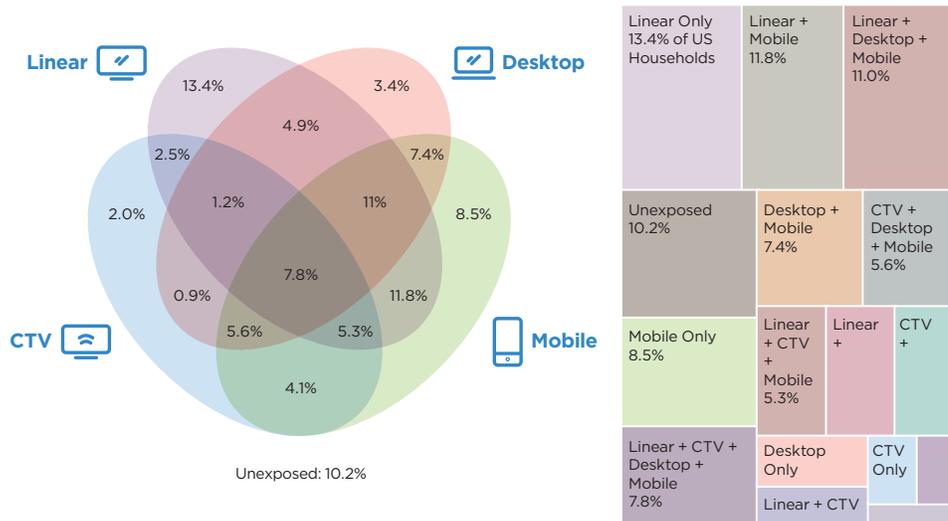
An advanced framework to plan and optimize CTV/OTT investments holistically

Plans need to be aware of the two sides of direct buys and programmatic. A cross-screen solution must account for this complex layer of the equation. Without a holistic, unified view, overlap and waste will destroy the efficiency and effectiveness of digital and linear buys, as well as investments across digital publishers. Look for technology with sophisticated decision science that can help bridge video sources and devise plans that account for all buying models in a future-facing, predictable way.

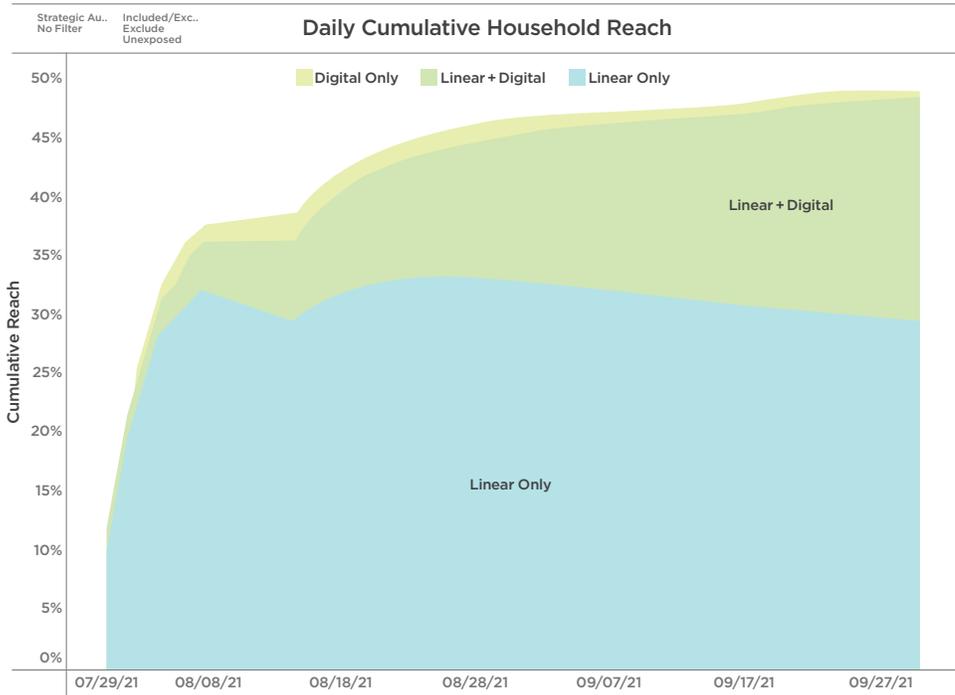
Robust cross-screen reporting and analytics

When cross-screen strategies are informed by advanced analytics, it is possible to quantify the value and efficiency that holistic planning and activation can offer. Advanced reporting and analytics also can inform your next campaign, in a continual process of testing and improvement. Here are some examples:

4Screen reporting delivers visibility across all screens

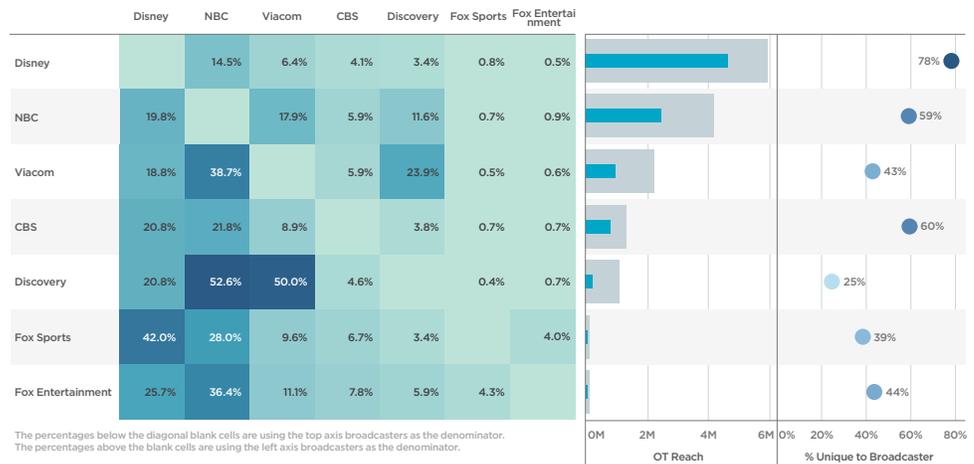


Cumulative reach curve: Understand overlap over time



Reach overlap reports uncover duplication channel by channel

Broadcaster Overlap, Reach and Cost per Unique Household



Finding the Right Solution Starts with Asking the Right Questions



Give me six hours to chop down a tree and I will spend the first four sharpening the ax.

- Abraham Lincoln



Planning Questions

Just like a good recipe, to make a plan work you need to start with all of the ingredients and information that go into the plan at the beginning to get it right. Here are some questions to ask that will help you find the right solution for holistic cross-screen plans from the start:

Cross-screen budget allocations

Will this solution provide the most efficient split of linear and digital budgets to maximize my objectives, including on-target reach at the optimal frequency?

Cross-screen reach and frequency

Will this solution provide an in-depth look into the individual demo and audience reach for my cross-screen plan at various cuts of data, inclusive of partner, network, daypart, week, ad length, and selling title?

Detailed partners and allocation

Will this solution specify which partners should be included in this plan and how I should allocate across different deals to maximize on-target reach?

Existing deals

With this solution, will I have the freedom to target and optimize both new and existing digital deals via my platform or buying method of choice?

Scenarios and impact analysis

Does this solution provide insight into the impact and scenarios involved in unifying my target audience and maximizing reach across screens?

Unification

Does this solution consider linear and digital video simultaneously such that a shift on one screen can impact the full allocation of budget and user reach on the other?

Currency

Does this solution provide the ability to use alternate currencies?



Optimizing Planning Cycles

Use cases for optimizing the full planning cycle

Solutions should provide optimization throughout the full year's planning cycle. Whether it's for data-driven linear or cross-screen planning, you should expect your technology partner to have experience supporting all of the essential aspects of planning, allocation, and optimizing your investments.

Use cases include:

- Upfront Planning
- Budget Allocation
- Scatter Planning
- In-Quarter Optimization & ADU Optimization



Upfront Planning

Plan and buy across linear and premium OTT partners heading into the Upfront. Highly specific plan outputs can support data-driven negotiations.

A national CPG brand used technology to streamline its planning process through the smart allocation of Upfront inventory based on the brand's distinct strategic target objectives.

The results were a 15% increase in strategic target reach and a 22% decrease in strategic target CPM.

15% increase in strategic target reach

22% decrease in strategic target CPM



Budget Allocation

Determine the optimal budget allocation across linear and digital before making any commitments or decisions.

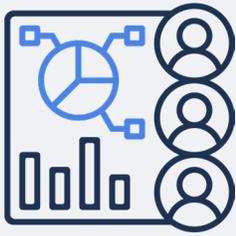
By shifting 27% of a \$3.5M budget to digital inventory, this advertiser got the best reach for their investment.

% Digital	P18-49 XS Plan Reach %
0%	11.75%
11%	12.72%
15%	12.83%
20%	12.80%
27%	12.88%
30%	12.82%
35%	12.66%
40%	12.32%
45%	11.90%
50%	11.54%

+10% increase in Target Demo Reach

27% portion of \$3.5M budget used in digital inventory

\$0 change in advertising budget



Scatter Planning

Scatter planning is essential to optimizing Upfront performance throughout the year, but it is frequently suboptimal due to complex portfolio management and cumbersome workflows. The goal should be to find the next best place to allocate dollars in the scatter market to drive new reach against audiences in both linear and digital video.

Using technology can help advertisers create an efficient, base-aware plan for unique incremental reach against Strategic Targets. It can also:

- Deliver a base-aware plan based on strategic targets & objectives.
- Factor in the desired reach and frequency constraints for optimal media allocation.
- Streamline workflow to replace cumbersome manual processes.

An advertiser wanted to use scatter budgets to increase strategic target reach.

Using planning technology that ingested the baseline plan and took into consideration market dynamics and buying rules, the advertiser was able to increase reach by 19%.

19% increase in strategic target reach



In-Quarter Optimization & ADU Optimization

Adjust desired budget while maintaining agreed-upon network-level flexibility and overall CPM, GRP and flighting goals.

Using technology can help advertisers streamline the ADU management process and maximize realized media value by:

- Maximizing ADU value across complex brand portfolios.
- Driving consistent performance of Upfront media.
- Limiting risk and streamlining workflow.

An advertiser facing a 15% under-delivery against their buy demo used technology to run weekly scoring plans against their incoming ADUs.

This allowed the advertiser to identify the best-performing inventory and make adjustments to their ADU allocation to drive better performance in near-real-time. The advertiser saw a 24% increase in strategic target reach.

24% increase in strategic target reach

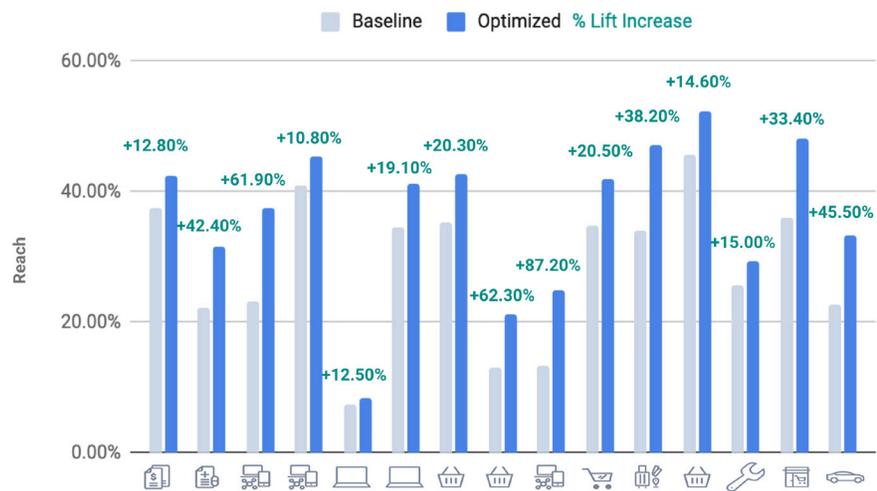


Portfolio Optimization

Planning technology powered by data-science decisioning can add even more value to the most complex plans by layering multi-brand and multi-campaign portfolio allocations across a portfolio of connected inventory sources. This leads to even greater economies of scale and significantly more value.

Portfolio allocation optimization increases reach

An agency with 17 brands optimized inventory across the portfolio. The result was increased reach across the portfolio by an average of 35%.



+35% average **increase** in reach across the portfolio



Streamline the Process and Optimize Outcomes

The world of investment planning is more complicated today than ever before. The only real way to understand the big picture of your media investment in this fragmented world is to have a technology solution that unifies and optimizes all of your video investment. The solution needs to bridge supply-constrained and programmatic environments and bring audiences together for a single view of all their media activity. Finding the right technology to help with this complexity is a necessity to help streamline the process and optimize outcomes.

Technology will never replace the art of planning, but it will augment the science to power better results. And better results will drive a better viewing experience for consumers which will lead to a more robust and sustainable advertising ecosystem.

Meet Amobee

Amobee TV is an intelligent advertising platform built for strategic media investment decisioning. It is underpinned by decision science that powers linear and cross-screen planning for supply-constrained inventory. It is purpose-built for video investment teams.

Amobee TV has been helping advertisers get the most out of their media investments for over ten years, with a continuing vision of creating a sustainable advertising ecosystem through smarter technology.

To learn more about how Amobee can deliver optimized, cross-screen, actionable plans that unify media and allocate investments, visit our [website](#) or contact us today at amobee.com/contact