

# The Future Of Omnichannel Media Buying Is Programmatic

Vision: The Digital Media Buying Playbook

by Richard Joyce

October 7, 2016

## Why Read This Report

Marketing leaders are embracing omnichannel advertising to create connected experiences that drive better results. How? By using programmatic approaches to make data-driven media buying decisions. A programmatic mindset serves as a foundational layer for making omnichannel advertising easier. But to transform multichannel media strategies into omnichannel ones, B2C marketers must understand and overcome internal and external complexities that stand in the way of omnichannel media buying. In this report, we outline the future of omnichannel media buying.

## Key Takeaways

### **Omnichannel Advertising Is An Organizational Nightmare**

People, processes, and technology issues stand in the way of omnichannel advertising. People are isolated in channels, processes are immature, and the tech landscape is saturated.

### **Programmatic Makes Omnichannel Digital Media Buying Simpler**

Marketers must use programmatic approaches to go from multichannel to omnichannel media buying. Programmatic allows marketers to adapt to dynamic customer behavior.

### **Marketers Must Lead The Change To Omnichannel**

Marketers must address internal organizational challenges for omnichannel advertising. They must also drive external change from adtech, publishers, and agencies.

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## Vision: The Digital Media Buying Playbook



by [Richard Joyce](#)

with [Srividya Sridharan](#), [Melissa Parrish](#), [Susan Bidel](#), [Samantha Merlivat](#), [Wei-ming Egelman](#), and [Laura Glazer](#)

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## Notes & Resources

Forrester interviewed seven vendor and user companies, including 360i, Accenture, Alex and Ani, IRI, Sephora, and Visual IQ.

## Related Research Documents

[Best Practices For Omnichannel Digital Media Buying](#)

[Bridging The Cross-Device Chasm](#)

[Exercise Complete Control To Maximize Media ROI](#)

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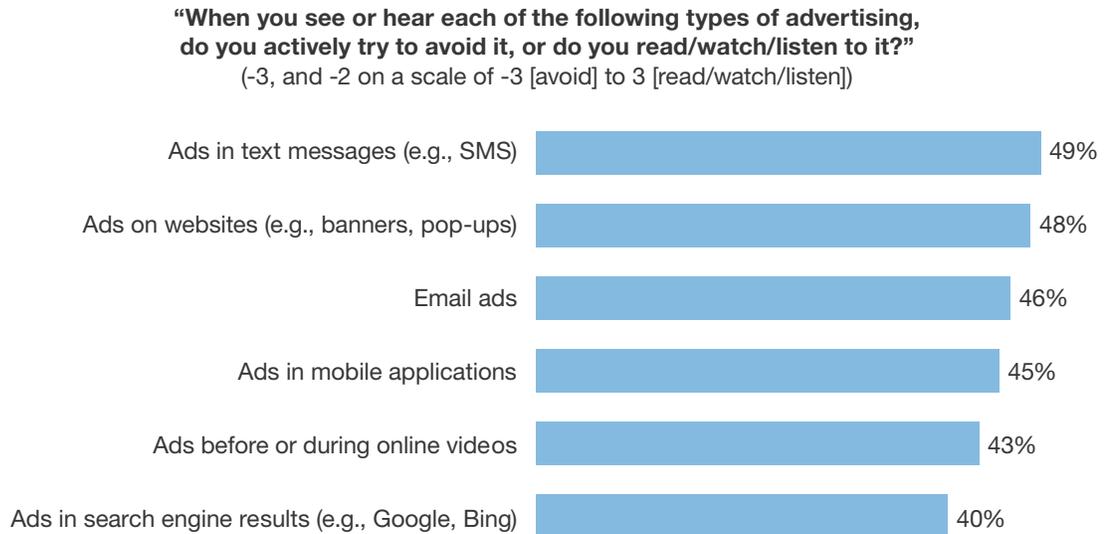
## Omnichannel Advertising Is An Organizational Nightmare

A strong brand can give marketers a competitive advantage, and improve their marketing effectiveness throughout the customer life cycle.<sup>1</sup> But winning customer attention is a challenge, and consumers will ignore marketers that can't create powerful and connected advertising (see Figure 1). B2C marketers struggle to create connected brand experiences with omnichannel advertising because of:

- › **Isolated media channel-based teams.** Channel-based teams derail the progress toward omnichannel advertising because of disconnected media strategies, success measurement, audiences, and technologies. Andrew Bakonyi, senior director of marketing analytics at Sephora, told us that the channel managers bring technology ideas to the table regularly, but he “realized it’s not a one-person job, and [he] initiated the organization of a team to get an overall [technology] stack.” As a result, he consciously created a team that isn’t isolated in channel silos, but flexible enough to adapt to dynamic customer needs.<sup>2</sup>
- › **Immature processes for fluid omnichannel advertising.** Typically, processes like planning and budgeting are tied to ad campaigns with siloed budgets that are hard to change during the year. Phil Gross, vice president of product management at Visual IQ, a multitouch attribution company, told us: “The operational and political challenges are the biggest ones that we run into. The idea that one channel may be undervalued compared to another is a change management nightmare.” Omnichannel advertising requires processes that can dynamically adapt to customer behavior, but even sophisticated marketers are still refining those processes.<sup>3</sup>
- › **Independent technology for every channel.** Marketers have to use several adtech solutions to do omnichannel advertising today, and 17% of them told us that integrating advertising tools with the rest of the marketing technology needs improvement.<sup>4</sup> The marketing and advertising technology landscape has grown significantly over the past decade and now accounts for roughly 3,500 vendors across nearly 50 categories.<sup>5</sup> Ad technology like demand side platforms (DSPs), data management platforms (DMPs), bid management platforms, social ad platforms, etc., must work together seamlessly to create connected brand experiences for today’s entitled customer.

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**FIGURE 1** Customers Often Actively Avoid Ads

Base: 60,049 US online adults (18+)

Note: not all results are shown.

Source: Forrester's Consumer Technographics® North American Online Benchmark Survey (Part 1), 2016

## Programmatic Makes Omnichannel Digital Media Buying Simpler

The transition from multichannel to omnichannel advertising is plagued by people, processes, and technology issues that still promote media strategies isolated in channels. B2C marketers that are making this transition in the post-digital world must use programmatic approaches powered by data and technology to move from multichannel to omnichannel digital media buying (see Figure 2).<sup>6</sup> Forrester defines omnichannel digital media buying as:

*The practice of sequencing digital advertising across channels so that it is connected, relevant, and consistent with the customer's stage in his or her life cycle.*

Programmatic approaches solve for the challenges that marketers face today in orchestrating omnichannel digital media buys by:

- › **Creating digital customer identities for better addressability.** Marketers know that the ability to associate customer interactions with individuals across channels is paramount to creating a connected brand experience. Adtech such as DMPs, onboarding vendors, and device graph vendors play a pivotal role in unifying customer identifiers across channels.<sup>7</sup> Craig Macdonald, managing director at Accenture Digital told us: “The most popular strategy consultant projects in

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the past 18 months have been helping clients rethink their data infrastructure. The conversation begins with the data management platform, as marketers try to understand how they can start to authenticate customers with digital identifiers.”

- › **Delivering personalized advertisements in near real time.** Today, marketers can collect a variety of data points programmatically, with technology like DMPs and DSPs. These data points highlight customer intent, location, content consumption behavior, affinities, and more — all of which can be used to personalize brand experiences in real time.<sup>8</sup> Nike partnered with Google during the 2014 soccer World Cup to deliver ads after live events occurred in the games, like a Nike athlete scoring a goal. The ads were delivered across 15 different countries, in real time, taking into account the live event, geolocation, language, device, browser, and more, inviting fans to customize banners of the moment and share with friends.<sup>9</sup>
- › **Automating access to inventory for smarter ad delivery.** Programmatic buying has increased the adoption of advertising APIs for digital media. Marketers access Facebook, Google, Instagram, Pinterest, Snapchat, LinkedIn, and more via APIs to execute programmatic advertising.<sup>10</sup> In fact, the IAB released OpenDirect 1.0 in 2015 and recently OpenDirect 1.5 in 2016, which is the standard API specification that publishers and marketers can use to execute automated direct buys.<sup>11</sup> Marketers can use the advertising APIs to program ad platforms, programming them to deliver brand experiences in the right moment.
- › **Tracking and optimizing to specific path-to-purchase scenarios.** Marketers are eager to find out how their brand experiences across channels impact business outcomes.<sup>12</sup> Programmatic helps marketers understand path-to-purchase behavior by connecting touchpoints within the customer journey and, more importantly, allows marketers to optimize toward interactions that will move customers to the next stage in the life cycle. Srishti Gupta, president, media center of excellence at IRI, a market research company, told us, “Connecting all consumer touchpoints is the goal, and it will allow for measurement and optimization at speed.”

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**FIGURE 2** The Omnichannel Mindset Makes Traditional Thinking Obsolete

	Traditional mindset	Omnichannel mindset
<b>Org structure</b>	<ul style="list-style-type: none"> <li>• Channel-based structure</li> <li>• Siloed team functions</li> </ul>	<ul style="list-style-type: none"> <li>• Customer journey and life cycle structure</li> <li>• Cross-functional teams</li> </ul>
<b>Creative approaches</b>	<ul style="list-style-type: none"> <li>• Mass appeal messaging</li> <li>• Limited story telling</li> </ul>	<ul style="list-style-type: none"> <li>• Personalized messaging</li> <li>• Sequential moment-based story telling</li> </ul>
<b>Media approaches</b>	<ul style="list-style-type: none"> <li>• Mass media</li> <li>• Scaled reach at efficiency</li> </ul>	<ul style="list-style-type: none"> <li>• Customer life cycle moments media</li> <li>• Quality touchpoints over quantity</li> </ul>
<b>Audience types</b>	<ul style="list-style-type: none"> <li>• Personas</li> <li>• Panel and device identifiers</li> </ul>	<ul style="list-style-type: none"> <li>• People</li> <li>• Authenticated identifiers</li> </ul>
<b>Tech outlooks</b>	<ul style="list-style-type: none"> <li>• Limited need</li> <li>• Executional</li> </ul>	<ul style="list-style-type: none"> <li>• Dependent automation</li> <li>• Strategic</li> </ul>
<b>Measurement goals</b>	<ul style="list-style-type: none"> <li>• Campaign results</li> <li>• Vanity metrics</li> </ul>	<ul style="list-style-type: none"> <li>• Multitouch</li> <li>• Business outcomes</li> </ul>

## Lead The Change From Multichannel To Omnichannel Buying

Marketers must realize that the complexity of omnichannel digital media buying requires deeper collaboration and partnership both internally and externally in order to deliver connected brand experiences (see Figure 3). Forrester believes that for marketers to deliver connected omnichannel advertising, they must:

- › **Embrace dynamic budget allocation to respond to real-time customer signals.** It's not enough to have a team that collaborates beyond the walls of media channels. Marketers must embrace budget fluidity in order to shift media investments in response to changes in customer behavior. A senior director of digital marketing at an online retailer told us: "It's a matter of communicating internally to make sure we don't silo audiences by working groups. We also try to streamline and coordinate all elements of the budget. Making sure it's not a question of which department spent the dollar but where we spent a dollar to get the best result."
- › **Develop deeper partnerships with ad technology providers.** Marketers are beginning to create direct relationships with adtech vendors instead of through their agency partners and demand more from these adtech partners.<sup>13</sup> Marketers must continue to be proactive in developing internal expertise, but can leverage the talent and experience that their adtech partners have been cultivating over the past 10 years. Igor Bekker, vice president of eCommerce and digital marketing at Alex and Ani, a jewelry retailer, explained: "We are relatively small in comparison to the large retail giants. To stay abreast of the competition and the changing digital marketing landscape, we create close partnerships with strategic vendors. Instead of investing in resources to manage and operate solutions, we invest in partnerships that support us and provide the agility we need."

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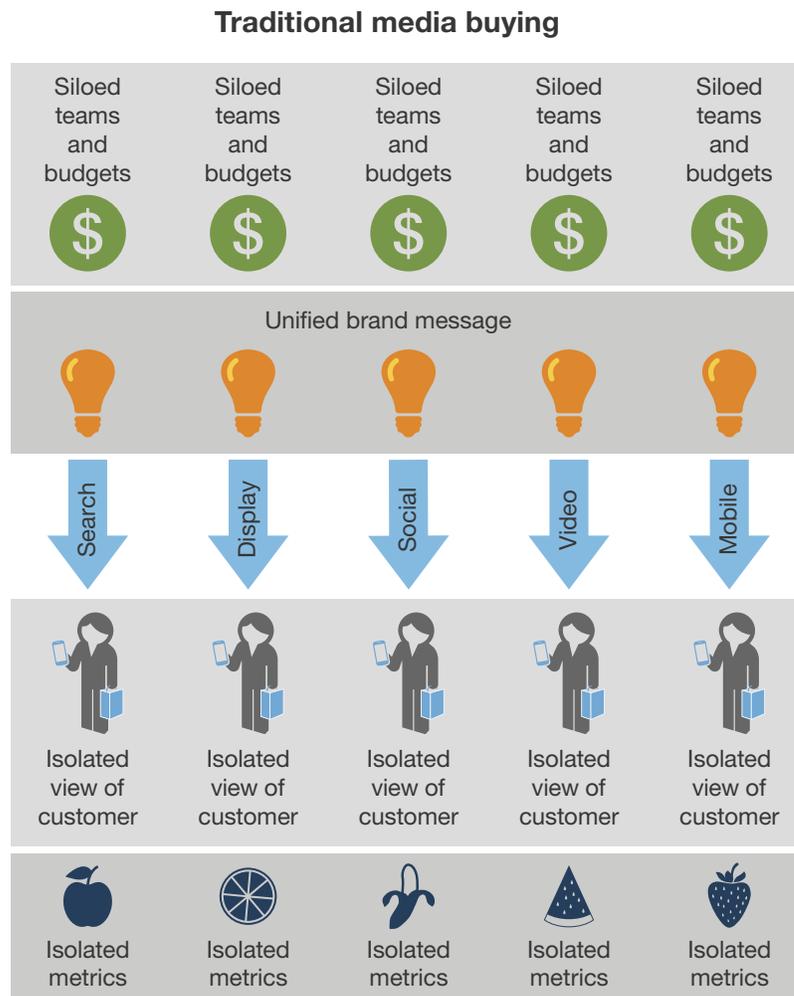
- › **Partner with publishers to enhance addressable customer identity.** Quality publishers have quality content and quality first-party data, which they must protect.<sup>14</sup> Marketers can't expect to freely access this valuable data without a mutual partnership — this could be paying a fee or making a media commitment. Marketers who can create these partnerships can use publisher data to stitch together customer identity for delivering and measuring omnichannel brand experiences. DMPs like Adobe, Krux, and Oracle have launched products to help marketers and publishers begin to bridge gaps between devices and people with consistent digital identities to use for omnichannel digital media buying.<sup>15</sup>
- › **Work with agencies that do more than just buy ad space.** Marketers are no longer looking for agencies that can only buy media on their behalf — they need agencies that can create connected brand experiences.<sup>16</sup> Forrester found, in partnership with SoDA, an organization for digital agencies, that 83% of agencies see the best route to growth as having the ability to create experiences and tools for consumers and brands — and they plan to hire accordingly.<sup>17</sup> As Jared Belsky, president at 360i, a digital agency, told us, “Clients are looking for speed and channel agnosticism; agencies that can bring creative, media, and strategy back together with technology.”

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**FIGURE 3** Traditional Buying Fails At Supporting Connected Brand Experiences

**3-1** Traditional media buying is siloed in people, budgets, channels, and insight.

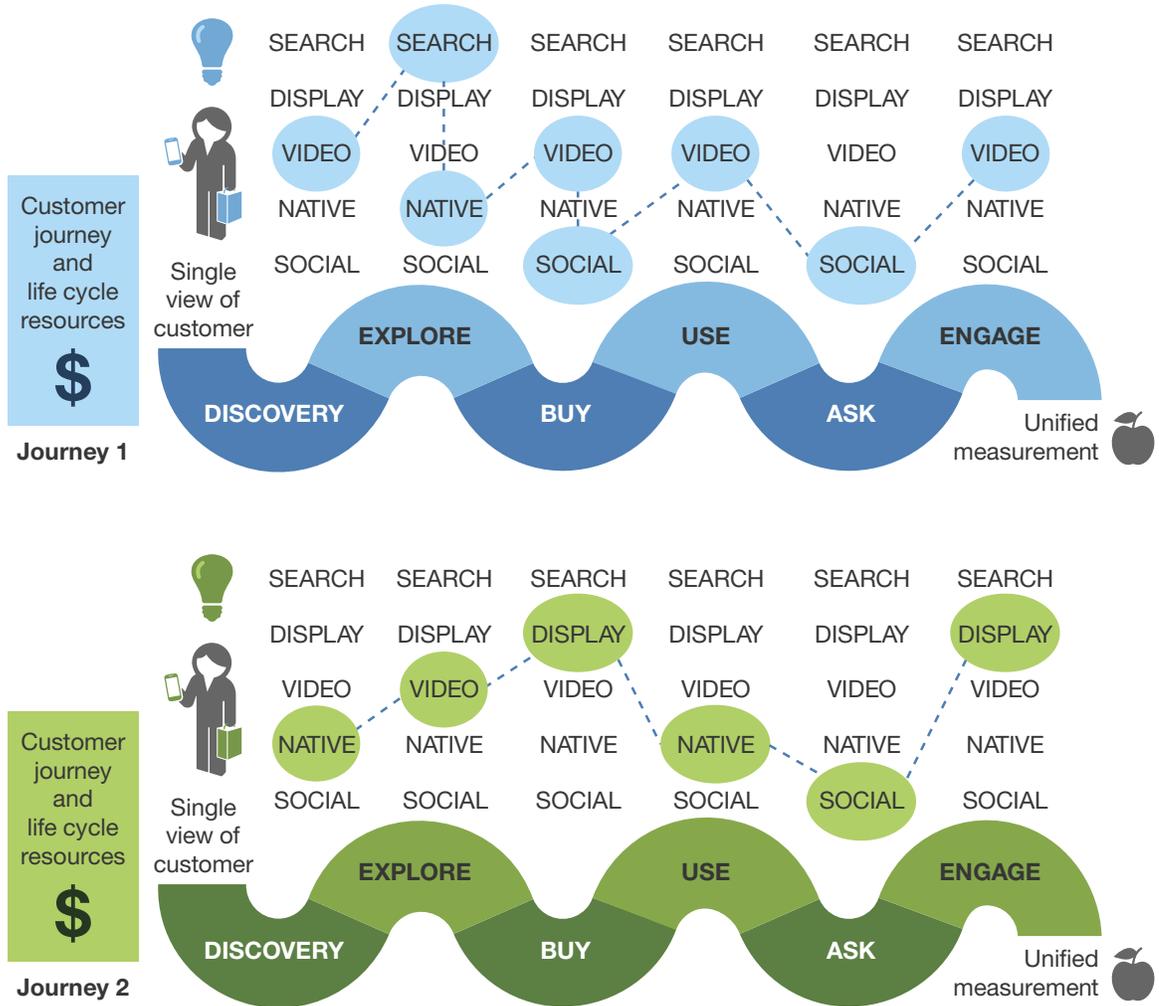


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**FIGURE 3** Traditional Buying Fails At Supporting Connected Brand Experiences (Cont.)

**3-2 | Omnichannel media buying aligns the customer journey with the customer life cycle**



**Recommendations**

**Take Three Steps To Start Omnichannel Digital Media Buying Now**

Your customer’s experience is fragmented, and it continues to get more fragmented with the prospect of smart refrigerators, virtual reality, and self-driving cars — so don’t try to take on omnichannel execution with one try. Start your omnichannel digital media buying journey by:

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- › **Experimenting with ad sequencing across a few channels.** Ad sequencing in one channel is passé. Marketers must now experiment with a few channels to evaluate how connected experiences improve business outcomes. For example, try synchronizing ad delivery — delivering a specific display ad based on a customer watching a specific video ad to completion — then look for lifts in performance against customers that were only exposed to one channel. These smaller tests will prove out the value of the omnichannel buying process over time, and prepare you for new digital touchpoints that continue to fragment the customer experience.
- › **Rationalizing ad technology across channels.** Marketers will benefit from managing multiple channels through a single ad technology — think operational efficiency, cross-channel optimization, better measurement — but most importantly, a single platform allows for greater control of the brand experience. Using point solutions can reduce control of message frequency, lead to mixed messages based on differences in how a customer is identified, and limit how quickly you can respond to a customer action in another channel. While it's true that no solution solves for omnichannel yet, using too much adtech with overlapping capabilities can lead to a negative customer experience with your brand.<sup>18</sup>
- › **Adopting unified marketing impact analytics (UMIA).** Marketers that use UMIA mix the best qualities of attribution and marketing mix in order to create a deeper understanding of marketing performance.<sup>19</sup> Within omnichannel digital media buying, attribution measurement techniques quantify the impact that digital touchpoints have on business outcomes, while identifying common customer experience paths. Grabbing the attention of the entitled customer will require a deep understanding of how customers use different media and where you can provide value at those digital touchpoints.

**What It Means**

## Omnichannel Marketers Will Find Game-Changing Data Uses

Programmatic plays a critical role in creating omnichannel brand experiences for customers in the future. As B2C marketers develop and refine their ability to create these experiences, expect the perception of the role of customer data and enterprise technology to change dramatically:

- › **Verizon will offer “free” service packages to customers in exchange for their data.** The key to delivering omnichannel brand experiences programmatically is addressable digital identity. After experimenting with various flavors of identity, marketers will realize that authenticated data allows them to create and measure the omnichannel experiences that their customers demand. With marketers looking for deterministic options outside of the “walled gardens,” they will turn to Verizon.<sup>20</sup> To increase their user base and compete with Google and Facebook, Verizon will provide customers with “free” basic internet, cable, and wireless packages. By offering these services for free, Verizon will be able to monetize its user data in ways that Google and Facebook can't, stitching customer identity into advertising opportunities across web, mobile, and TV based on known users.

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- › **Google and Facebook will empower individual users to monetize data.** Today, ad-supported content and services are in jeopardy as more consumers adopt ad blockers, subscribe to content providers, and skip ads when they can. While consumers know that their attention is valuable, they haven't quite grasped the value of their personal data — only knowing that they want to prevent private and public entities from collecting it without their permission.<sup>21</sup> As they start to understand that third parties collect and sell their data regularly, they will demand compensation. To accommodate growing user demand, Google and Facebook will create tools that allow their users to sell data like affinities, intent, device links, etc., to brands they trust and the highest bidder.
- › **Adtech pipes will become middleware as integrations become standardized.** Today, the adtech ecosystem is crowded, but it's still a pretty small world. Most major players in the space are integrated — the biggest DSPs, DMPs, exchanges, marketing technology platforms, data providers, etc., work with each other on a regular basis. With every OpenRTB release or new ad API, the mode of communication between technologies becomes more standardized. While adtech vendors today support the pipes to connect with the larger ecosystem, they are continuously redefining how they add value for marketers. Expect adtech vendors to focus on the science behind real-time and cross-channel decisioning as marketers move from multichannel to omnichannel.
- › **IBM's Watson wins 15 Cannes Lions by 2025 in the promo and activation category.** The largest DSPs in the digital landscape see trillions of impressions annually, which equates to billions of data signals, across billions of devices, millions of users, and multiple channels. People will always play an intrinsic role in advertising — we still rely on emotion to make brand decisions, and we are good at creating emotion. But we aren't good at processing massive amounts of data in real time to make decisions. As advertising becomes more complicated, we will have to rely on machines and artificial intelligence to make media investment decisions for us. The tipping point will be when marketers see machines win awards that historically were awarded to people.<sup>22</sup> While it will be hard to relinquish control, as Ken Jennings joked when Watson won Jeopardy in 2011, "I for one welcome our new computer overlords."

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## Supplemental Material

### Survey Methodology

Forrester's Consumer Technographics® North American Online Benchmark Survey (Part 1), 2016 was fielded in February and March 2016. This online survey included 60,049 respondents in the US and 6,284 respondents in Canada between the ages of 18 and 88. For results based on a randomly chosen sample of this size, there is 95% confidence that the results have a statistical precision of plus or minus 0.4% of what they would be if the entire population of US online adults (defined as those online weekly or more often) had been surveyed and plus or minus 1.2% of what they would be if the entire population of Canadian online adults had been surveyed.

Forrester weighted the data by age, gender, income, region, and broadband adoption to demographically represent the US and Canadian online adult populations. The survey sample size, when weighted, was 60,049 in the US and 6,276 in Canada. (Note: Weighted sample sizes can be

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different from the actual number of respondents to account for individuals generally underrepresented in online panels.) Lightspeed GMI fielded this survey on behalf of Forrester. Survey respondent incentives included points redeemable for gift certificates.

**Companies Interviewed For This Report**

360i	IRI
Accenture	Sephora
Alex and Ani	Visual IQ

**Endnotes**

- <sup>1</sup> In the age of the customer, brand building is more important than ever to differentiate offerings and create long-term customer value. However, marketing leaders seeking to defend or increase their brand marketing budgets still must convince their C-suite peers of the financial value of the brand. See the [“Invest In The Brand Building Experience”](#) Forrester report.
- <sup>2</sup> Digital media buying has evolved through a process of testing and learning, which inevitably leads to mistakes in strategies, tactics, and partnerships. Don’t let your company be hampered by these immature and inadequate legacy systems and processes. Wipe the slate clean and start anew using this case study as inspiration and instruction on how to build a high-performing and highly accountable digital marketing practice for today and tomorrow. See the [“Exercise Complete Control To Maximize Media ROI”](#) Forrester report.
- <sup>3</sup> Digital media buying has evolved through a process of testing and learning, which inevitably leads to mistakes in strategies, tactics, and partnerships. Don’t let your company be hampered by these immature and inadequate legacy systems and processes. Wipe the slate clean and start anew using this case study as inspiration and instruction on how to build a high-performing and highly accountable digital marketing practice for today and tomorrow. See the [“Exercise Complete Control To Maximize Media ROI”](#) Forrester report.
- <sup>4</sup> Source: Forrester’s Q1 2016 Global Cross-Channel Campaign Management And Enterprise Marketing Software Suites Forrester Wave™ Online Customer Reference Survey.
- <sup>5</sup> Source: Scott Brinker, “Marketing Technology Landscape Supergraphic (2016),” Chief Marketing Technologist blog, March 21, 2016 (<http://chiefmartec.com/2016/03/marketing-technology-landscape-supergraphic-2016/>).
- <sup>6</sup> The post-digital future has arrived with its different customer behaviors, attitudes, and business practices. However, decades-old habits forged in the mass marketing era still undergird most marketing plans. Digital media buying isn’t safe from the transition to the post-digital era and the siloed channel based buys of the past, and must be replaced by an omnichannel approach to advertising. Marketers must rely on data, technology, and speed for effective omnichannel digital media buying in the post-digital era. See the [“Thriving In A Post-Digital World”](#) Forrester report and see the [“Best Practices For Omnichannel Digital Media Buying”](#) Forrester report.
- <sup>7</sup> Today’s B2C marketers’ challenge is to reach always-addressable customers across multiple screens effectively. While a multitude of tools present cross-device targeting and measurement as table stakes and most vendors claim to be able to bridge the cross-device gap, few can actually do this well. B2C marketers who want to build a consistent relationship with their customers must learn how to manage cross-device targeting and measurement now. This report identifies different approaches for tackling the cross-device chasm and highlights how marketers can select the approach that best works for them. See the [“Bridging The Cross-Device Chasm”](#) Forrester report.

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<sup>8</sup> “Advertisers are using more customer data than they have ever been able to use before to inform their digital media buying. They are using technology like DMPs to ingest, process, and deploy valuable audience segmentations that boost the effectiveness of their digital media buys across channels like display, video, and social. Advertisers employing DMPs are ingesting and using up to 35 data sources — everything from first-party data to third-party data segments to mobile and wearables.” See the “[The State Of Programmatic Digital Media Buying 2015](#)” Forrester report.

<sup>9</sup> Source: “Nike Phenomenal Shot,” Think with Google (<http://apac.thinkwithgoogle.com/campaigns/nike-phenomenal-shot.html>).

<sup>10</sup> Source: Melody Hahm, “It’s a ‘grave mistake’ to neglect Snapchat: Gary Vaynerchuk,” Yahoo Finance, June 17, 2016 (<http://finance.yahoo.com/news/grave-mistake-snapchat-gary-vaynerchuk-advertising-partners-api-193721612.html>).

<sup>11</sup> Source: “IAB OpenDirect Specification,” IAB (<http://www.iab.com/guidelines/iab-opendirect-specification/>).

<sup>12</sup> Businesses want real-time insights into their marketing performance and the customers they target: who they are, what matters to them, and what they respond to. However, with the eternally evolving customer ecosystem, measuring every interaction that a customer has with a brand is a constant challenge. See the “[Use Cross-Channel Attribution To Understand Marketing Effectiveness](#)” Forrester report.

<sup>13</sup> Fifteen percent of marketers work directly with 11 different types of ad technology today. Source: ANA/Forrester Q1 2016 US Programmatic Media Buying Online Survey.

<sup>14</sup> Publishers have to attract consumers with quality content. But after publishers establish one-to-one relationships with their consumers, the resulting interactions generate valuable first-party data. See the “[Brief: Publishers Must Invest In First-Party Data Protection](#)” Forrester report.

<sup>15</sup> Source: Kelly Liyakasa, “Adobe Positions Its Cross-Device Co-op As An Alternative To Facebook/Google,” Ad Exchanger, March 22, 2016 (<http://adexchanger.com/mobile/adobe-positions-cross-device-co-op-alternative-facebookgoogle/>).

<sup>16</sup> As marketers move from managing their brand to leading a connected brand experience, they will need agency partners that can help develop and execute their vision. To effectively manage agency partners in this endeavor, marketers must reorient themselves to the shifting terrain of the agency landscape where digital is no longer an agency differentiator. See the “[Revamp Your Agency Roster To Lead A Connected Brand Experience](#)” Forrester report.

<sup>17</sup> Source: Forrester/SoDA Q1 2016 Global Digital Outlook Online Survey.

<sup>18</sup> Building your advertising technology (adtech) stack means debating whether point solutions or full-stack solutions work for you. But that is the wrong question. Instead of fretting over this choice, understand your digital media maturity and estimate the costs, benefits, and risks of your existing adtech stack. See the “[Brief: Don’t Get Lost In The Point Solution Versus Full-Stack Ad Technology Debate](#)” Forrester report.

<sup>19</sup> CI pros and marketers need a more accurate analytical approach to untangle the Gordian knot of marketing performance insights. While aggregated and user-level measurements have their siloed advantages, their misaligned insights cause marketing planning problems. CI pros must embrace unified marketing impact analytics (UMIA) — a way to mix the best qualities of attribution and marketing mix. See the “[Embrace Unified Marketing Impact Analytics To Deliver Value Across Interactions](#)” Forrester report.

<sup>20</sup> “Mapping Yahoo’s 165 billion daily data events to Verizon’s deterministic data set of 100 million wireless users and 5.8 million set-top box subscribers gives Verizon more holistic understanding of (and access to) customers than competitors. Expect Verizon’s ad products to allow targeting at the individual level across devices and online channels — something that online walled gardens from Facebook or Google or traditional cable and telecom competitors like Comcast don’t provide.” See the “[Quick Take: Verizon Takes On Google And Facebook With Yahoo Acquisition](#)” Forrester report.

<sup>21</sup> When consumers manage their own data, they will hold equal responsibility for ensuring that their identity and data are secure. This means judicious curation of the entities they share data with and aggressive management of identity keys and passcodes; changing keys frequently will be mandatory. Meanwhile, breaches of marketer databases and

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websites will be less dangerous because all that could be stolen would be the “pointer” to the field in a data locker — useless without authentication. See the [“Use Personal Identity And Data Management To Future-Proof Your Privacy Practices”](#) Forrester report.

<sup>22</sup> IBM Watson, Apple’s Siri, and Microsoft’s Cortana: these are examples of a new wave of computing that Forrester calls “Cognitive engagement”. Collectively, these disruptive forces will create and destroy jobs, companies, and industries alike over the next 20 years. See the [“Cognitive Engagement: A New Force Of Creative Destruction”](#) Forrester report.

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