HbbTV's Time to Shine

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Hello I'm Sameer and I look after outcome measurement at ITV and am part of the team working on the Lantern project - a cross broadcaster outcome measurement program in the UK

Three puzzles

What has held large scale linear data back?

Why is it desperately needed now?

How can we make the most of it, quickly?

I've been deeply involved in the use of HBBTV data in the UK - in fact I was late to this because I was on a legal call about exactly this. So I'm going to talk about my learnings on how to make use of it more quickly. And I'm going to explain our motivation for doing that.

But I'm going to start by asking why isn't it more popular? If HBBTV is so good, why aren't more people and more countries using it.

And as we've heard, given the amount of fragmentation of viewing, you'd expect that HbbTV data and other forms of linear device data would be popular. We have more screens. We are watching a greater variety of content on those screens. And yes while those screens are increasingly serviced by IP streams and adservers, that transition hasn't fully happened yet. There is still a vast amount of linear viewing data in set top boxes and, of course, HbbTVs.

So why isn't every country in Europe using all the linear data they can get their hands on?

1. TV is generally traded on TAM currency and currencies are generally defined as people not devices. Broadcasters currently trade on a personified audience basis for some of their revenue. Which means bigger channels get more of the money. But it is the smaller channels, or broadcasters with more channels, that are the first ones to be affected by fragmentation. They have more of the zero rated spots. Smaller lobsters get boiled first.

2. And in the JIC and MOC systems around the world, because they are smaller, they have less power. They contribute less money. They have fewer votes and less influence. Which in turn reinforces a measurement conservatism. If you think about it, this is why Sky's AdSmart exists - they had large amounts of low and zero rated spots that were worthless in currency terms. So they had to think of some other way to make money from them. Or to look at it another way, panel-based audience measurement is like the British 'first-past-the-post' voting system, rather than the proportional representation system many of you have in your markets.

3. And then the measurement people worry. And they worry. A lot. They worry about representativity. About bias. They want to make their panels even bigger to tackle the viewing fragmentation. They worry about the quality of large scale device data and are happy for it to come in and fill a few zero rated spots, as long as it the reporting is still 'panel-first'. They talk a lot about the importance of JIC based, consensus driven, transparent measurement

Three puzzles

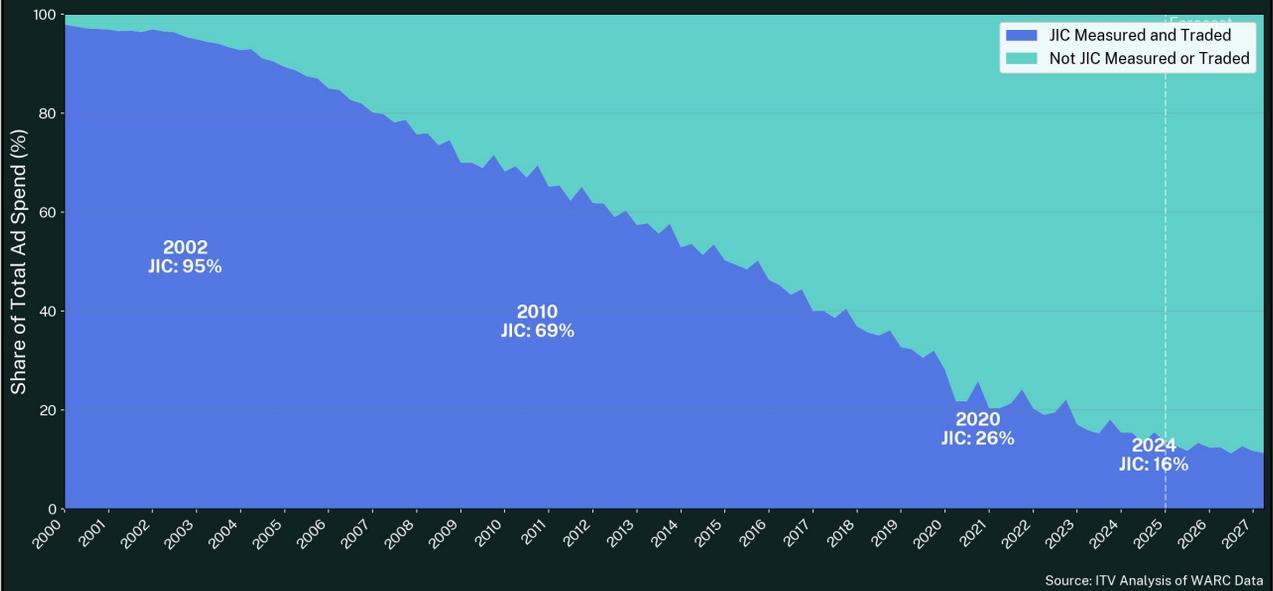What has held large scale linear data back?

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Ok - so why do we need HbbTV data now more than ever?

The short blunt answer is that this kind of traditional, personified TV audience measurement is increasingly irrelevant in media.

Did proprietary audiences win?

Share of Total Ad Spend (%)

- JIC Measured and Traded
- Not JIC Measured or Traded

2002
JIC: 95%

2010
JIC: 69%

2020
JIC: 26%

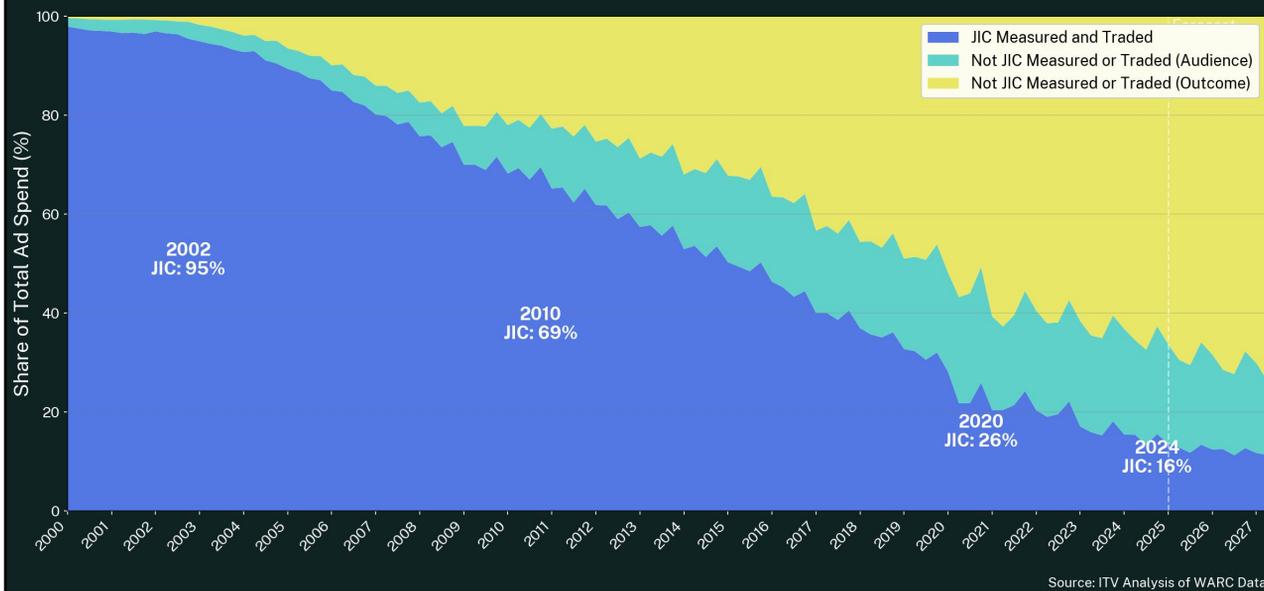2024
JIC: 16%

Source: ITV Analysis of WARC Data

And we can see that clearly here. This chart shows UK media spend split not by print, TV etc, but simply by whether there was a currency JIC involved in the trading. And it's only going one way.

SO you might look at this and say to yourself, this means that proprietary audiences from Google and Meta won.

But that wouldn't be quite right either.

No, but proprietary models did

Chart: Share of Total Ad Spend (%), 2000–2027

Legend:
- JIC Measured and Traded
- Not JIC Measured or Traded (Audience)
- Not JIC Measured or Traded (Outcome)

Annotations:
- 2002 JIC: 95%
- 2010 JIC: 69%
- 2020 JIC: 26%
- 2024 JIC: 16%

Source: ITV Analysis of WARC Data

Because what's really happening is not that the money is moving from transparent audience measurement to proprietary audience measurement. It's that it's moving away from buying audiences altogether. The vast majority of media money in the UK today is not bought on the basis of audiences at all, but on the basis of outcomes.

Specifically, when you put money in the Google slot machine, what you're actually paying for is access to a high-quality prediction model. The thing walled-in to the walled garden is a measurement model. Measurement is prediction now, and the platform business model is that you pay per prediction and get reporting on the basis of the outcome you delivered.

That outcome has evolved over time - in the early days it was attribution based, then it moved to lift experiments, and now they are selling incremental conversions - you only pay for the sales that would not otherwise have happened.

And absent any measurement from media owners like TV, the finance people in those millions of businesses have been voting with their wallets. Whatever we may think about this, the advertiser decision is clear.
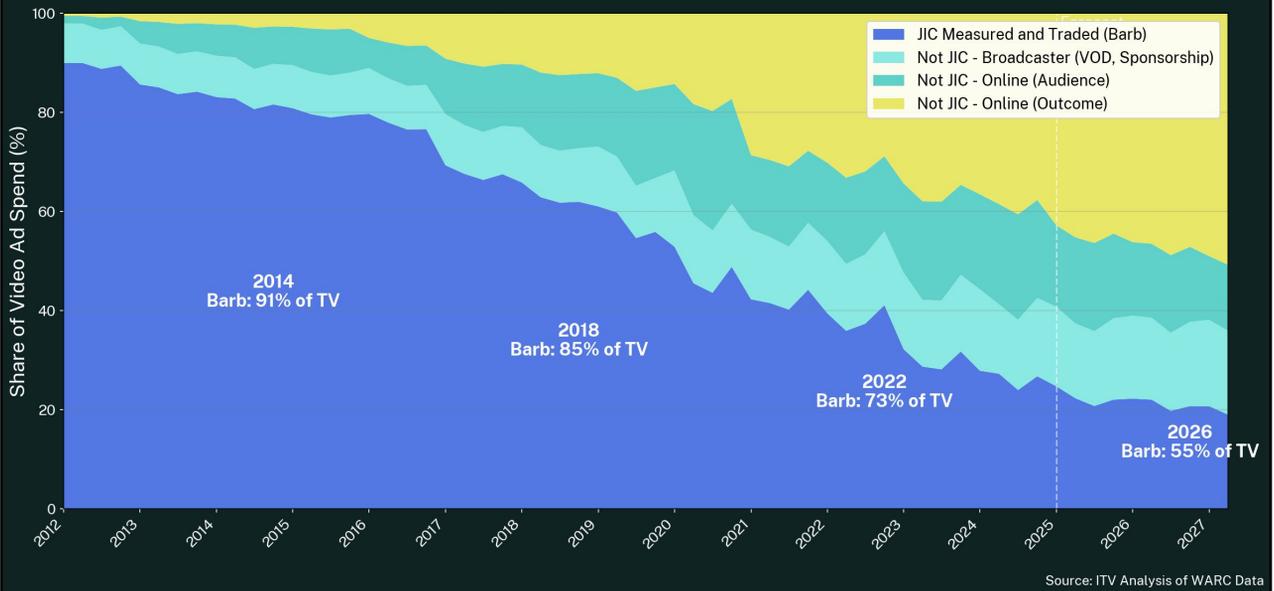
And in case you were thinking that this doesn't apply to video adspend, I've got bad news for you. The majority of UK video adspend will soon be bought with outcome measurement.

Now this chart is actually interesting for another reason. Because as well as the growth of outcome traded spend, notice the bottom two blocks. Those represent money that is spent with broadcasters.

And the funny thing is that half of our own money will soon not be traded on the basis of a Barb currency. Because for the VOD spend, we don't use Barb at all, but instead we use the registration data - the proprietary registration data - that registered users send us, So not only are we moving away from the thing that used to drive our business, we're not moving towards the thing that will drive it in the future which is outcome measurement.

And they are going to get even better

And coming back to the platforms, and that yellow block at the top, if it sounds bad now, just wait until the otters come.

This is a chart by Professor Ethan Mollick. Every time he plays with an AI model, he asks it to make an image of 'an otter on a plane using wifi'. In the early days, the images were frankly disturbing, but look at how good they've gotten in a few short years.

Upgrading 20-year-old ad stacks with LLM tech trained on advertiser data


And if you listen to what the Platforms are saying, there is currently a massive rebuilding effort under way.

They are rebuilding their 20 year old ad products to take advantage of new AI modelling approach and apply it to all of the data that advertisers have given them over the decades.

And what this means is that the platform products are going to evolve in the same way that LLMs did - they are building Large Outcome Models which will privatise marketing knowledge

We need near-term outcome models and near-term outcome models need HbbTV
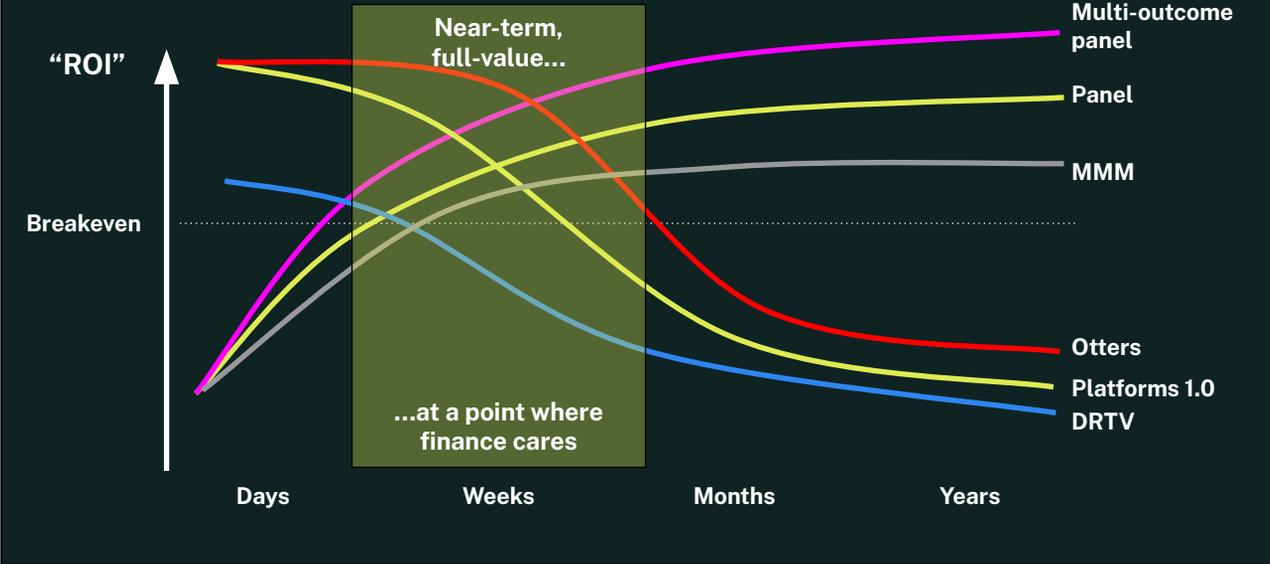
So what this means is that need outcome models of our own, and to build models of our own we need HbbTV data. Because it's only by having large scale exposure data to link to large scale outcome data to make better predictions.

**A growth strategy for TV:
Build multi-brand, multi-category,
multi-outcome models that can
influence advertiser finance teams to
grow our share of their spend to match
the share of near-term incremental
value we create for them**

So our strategy, across the broadcasters in the UK is this. Lantern is really a project about building large scale outcome models that will allow us to compete in the middle of that diagram, and win a fair share of the business value that we create for advertisers.

So coming back to my puzzle about adoption, how do we get HbbTV more widely adopted?

1. It won't help with the bottom piece quickly for all the reasons we've been discussing - that isn't going to be what drives the pace
2. It won't get much advocacy from targeting focused people in broadcasters because they have a number of alternatives in most markets.
3. But it *can* get support from outcome measurement initiatives, where, with the right permissions and match keys, the data can be hugely powerful

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Hurdles to overcome

Money vs Time

- Existing TAMs are costly and slow to evolve
- New outcome systems, though cheaper, still have a cost

'Census' vs Permissions

- Audience researchers want completeness
- Broadcasters need to enable collection per channel/mux

Schedules and Metadata

- Need schedules and advertising metadata to produce ad exposures

Existing audience measurement systems are costly and slow to change
New measurement systems for outcome are cheaper but still have a cost

Demands of the data are different - audience researchers want 'census' - which is to say having not wanted the data at all - if they do want it they want it to be 'representative' and therefore have all of it. Anything less is regarded as sampling error.

The challenges with this are that broadcasters need to give permission for their channel to be collected, and many of them have different preferred vendors - this matters to the audience measurement community - sampling bias again, but less for for outcome measurement, which needs match keys and permissions, but is less dependent on scale as long as it's large *enough*.

And that in turn depends on the permissions sought from the consumer which vary by country and by application. Collecting for audience measurement is generally easier in permission terms than collecting for outcome, but collecting for outcome has more value

# Treat it as a shared resource for all parties
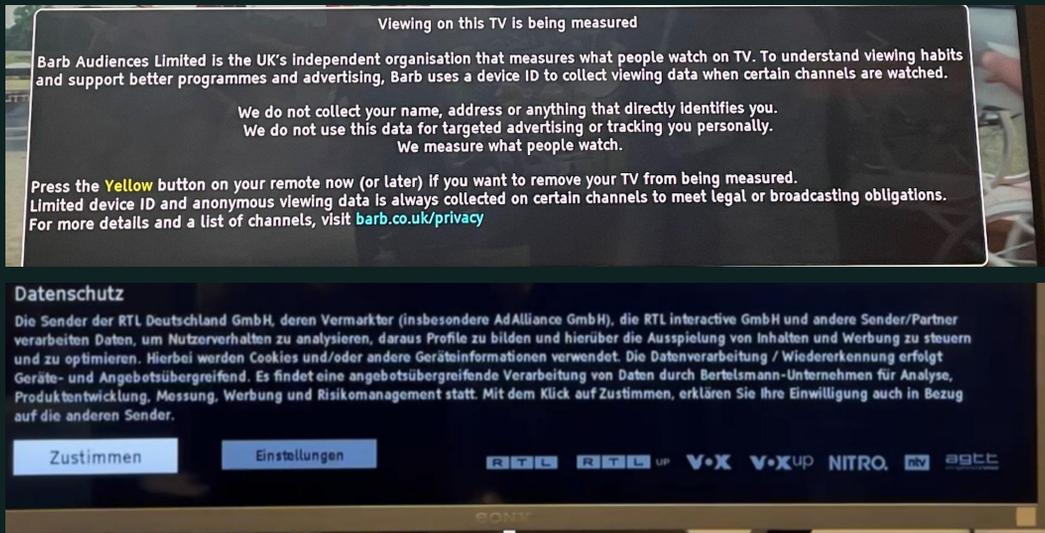
And the risk is that if the audience measurement use case gets to the rollout first, they will pursue only the permissions needed for audiences.

Whereas if the outcome measurement people get there first they'll prefer to get more match keys, say, than more scale.

It therefore has to be treated as a shared resource for the entire ecosystem - and requires careful discussion between all parties.

But we can't take too long because things are urgent.
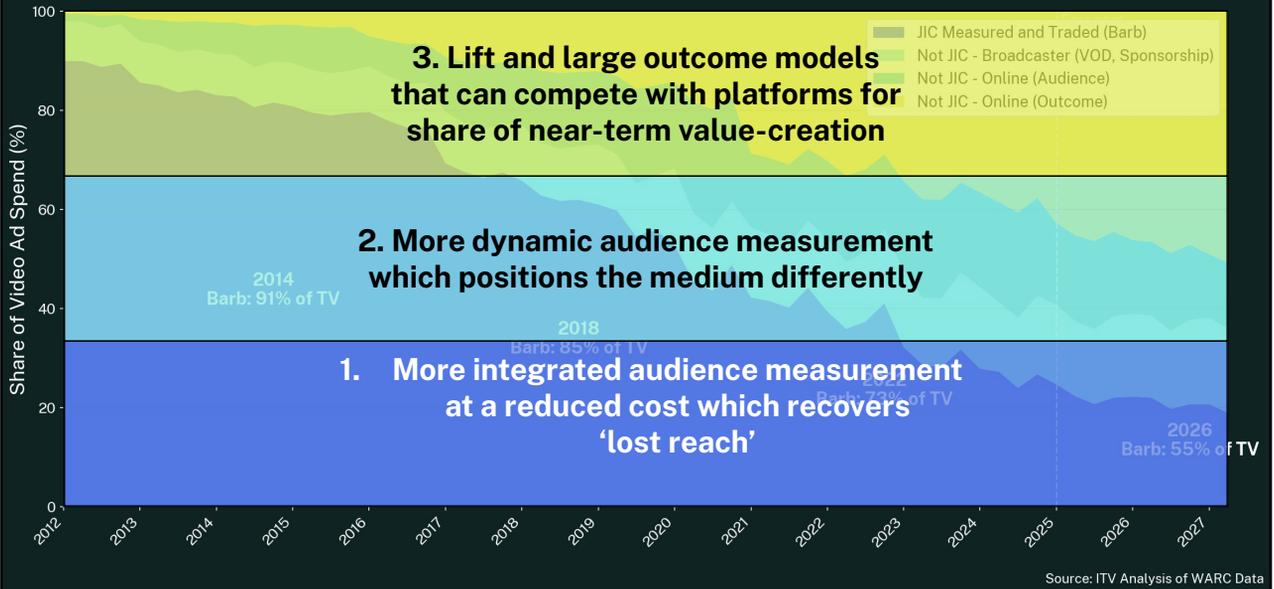
But the prize is also significant. If we can get people to collect it sensibly, and make it available sensibly, then there's potential to get HbbTV data to help with lost reach as well as zero rated spots, and then in the middle of the chart, to produce more dynamic audience reporting - live etc - and at the top, we see the outcome measurement use cases, which are strategically vital for the future of our industry.