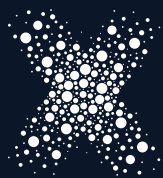


DIGITAL OUT OF HOME: REALIZING THE POTENTIAL

Your Guide to the Programmatic
DOOH Opportunity and Best
Practices to Get Started



XAXIS

THE OUTCOME
MEDIA COMPANY

PART ONE

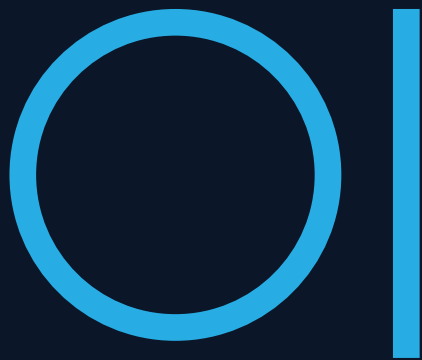
PROGRAMMATIC DOOH: REALIZING THE POTENTIAL

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PROGRAMMATIC DOOH:

REALIZING

THE POTENTIAL

EXECUTIVE SUMMARY

This year, digital out-of-home (DOOH) advertising is forecasted to capture **40% of OOH ad spending**, representing a global advertising spend of **\$16 billion** and making OOH the only traditional advertising category that's still growing strong.

DOOH offers what is becoming increasingly difficult for marketers: capturing busy consumers' attention during noisy, media-cluttered days. By combining sophisticated technology with clever content, advertisers can create an emotional and engaging experience for millions.

And because DOOH inventory is now being sold programmatically, the enhanced value of integrating with broader campaigns will make programmatic DOOH the industry standard. To get there, the market needs to make significant improvements.

This report provides a practical and comprehensive guide to understanding and activating DOOH around the globe to help marketers achieve outcomes that matter to their business.

THE OUT-OF-HOME
ADVERTISING
INDUSTRY, "DESPITE
BEING ONE OF
THE WORLD'S
OLDEST FORMS
OF MARKETING, IS
EMBRACING DIGITAL
TECHNOLOGIES."

- The Economist



THE RISING VALUE OF PROGRAMMATIC DOOH

Digital out-of-home advertising is presenting new opportunities to reach and influence consumers, adding new targeting, reach, engagement, and amplification to marketing campaigns. “Despite being one of the world’s oldest forms of marketing,” the Economist says, the out-of-home advertising industry “is embracing digital technologies.”¹

Digital technologies have made out-of-home advertising the only traditional advertising category showing significant growth.² And DOOH inventory continues to increase, forecasted to grow 10% for each of the next three years, capturing 40% of total OOH ad spending, with total investment in DOOH doubling by 2025 to more than \$34.2 billion.³

New opportunities abound in malls, stores, lobbies, elevators, sidewalks, and roads. As digital screens replace paper, paste, and paint, messages can seize the moment to be more finely tailored to target audiences. By adding external data feeds, placements can be triggered in response to real-world conditions, deliver content relevant to a place, time, and, ultimately, intended consumers, making the messages increasingly relevant. But the benefits of DOOH go well beyond speed and the ability to change creative on the fly.

Programmatic buying capabilities are enhancing the opportunities in marketers’ portfolios, making DOOH more precise, powerful, and cost-efficient. As DSPs integrate DOOH, media buyers are gaining streamlined abilities to target consumers on-the-go and in nearly-real-time; to leverage mobile’s location-based strengths; and to retarget audiences first reached on other types of screens.

DOOH amplifies other messaging, and its location- and time-based capabilities are adding new measurement capabilities that enable marketers to achieve desired outcomes. Buying DOOH programmatically enhances its abilities as a medium that is:

INTEGRATED

Media buyers can execute their campaigns across screens, integrating their DOOH buys with entire campaigns, shifting budgets, targeting, and executing creatives for maximum effect.

OMNICHANNEL

DOOH campaigns can be synced and targeted to campaigns across any type of screen.

MEASURABLE

Techniques for measuring DOOH exposures and mapping them to programmatic’s one-to-one capabilities are giving cross-device measurements new meaning.

ACCOUNTABLE

DOOH is becoming provably accurate, enabling marketers to understand its effect on key KPIs such as brand lift, sales lift, and increased footfall to stores, also known as visitation lift.



Digital Out-of-Home, Defined

Dynamically-served visual medium that reaches consumers on the move, with advertising that is targeted, un-skippable, and always above the fold.”

iab.

Enhanced Capabilities

Digital out-of-home adds a wealth of enhanced capabilities to both digital campaigns and traditional OOH:

AUDIENCE COMPOSITION

DOOH audiences are often younger, harder-to-reach, and lighter in TV viewing than other potential target segments. In Europe, for example, those exposed to DOOH screens over-index compared to the general population for income, youth, education, and employment. They are more active and have higher spending power than the population at large.⁴

DAY-PARTING

Digital signage can be changed according to the day, time, and calendar. Signs near stadiums or concert halls, for example, can carry messaging appropriate to events in those venues.

CREATIVE SPEED, FLEXIBILITY

DOOH creative can be trafficked and placed as quickly as systems will allow — often as quickly as 15 minutes — unlike traditional billboards that take days, at best. Ads can be triggered in response to events, such as a team's win or the weather.

CREATIVE OPPORTUNITIES

Retail outlets are introducing new screens on carts, shelves, and near checkout. Movie theaters project ads onto lobby floors and walls. Creative can be crafted to capture attention with new and unique opportunities. DOOH screens give marketers a large creative canvas for consumers to see (and sometimes hear).

TESTING

DOOH allows for quick and cost-efficient message testing in-market in ways made possible through limited screen applications, timing, and control.

INTERACTIVITY

Consumers can touch screens or use their mobile devices to interact with them.

FREQUENCY OPTIMIZATION

Advertisers can control the rotation of ads to appear at the right levels within the right timeframes.

TARGETING

DOOH technologies are presenting media buyers with a wealth of opportunity to selectively and effectively target the right people at the right time with the right message. Brands can tailor messages according to real-world behaviors. Messaging to fans of specific sports can be extended to placements in gyms, bars, and relevant billboards. A “regular coffee commuter” might be someone who visits a breakfast beverage chain daily and can be targeted, or re-targeted, near a place they frequent.

OFFENSE AND DEFENSE

Location can be used for conquering of competitor audiences or to defend against competitive attack, often with the aid of mobile location data. Messages can be placed near competitors to entice potential new customers, or be placed to solidify relationships with existing audiences. An advertiser can effectively target a radius around a competitor's store, determine where visitors to that store linger, then target those locales.

Reasons to Invest in Programmatic DOOH

Programmatic DOOH gives marketers multiple reasons to invest in it, offering them:

- ▣ A unique digital strategy to include new reach, targeting, amplification, and optimization
- ▣ Programmatic automation
- ▣ Frequency optimization among all DOOH screens
- ▣ Choice of Day, Day-part, and Location
- ▣ Targeting by context of day, time, location, events
- ▣ Always in-view and “above the fold”
- ▣ Moving images play to completion
- ▣ Combats ad fraud such as bots
- ▣ Zero ad blocking
- ▣ Zero skipping or channel changing
- ▣ High-impact creative Impact messaging
- ▣ Brand safety
- ▣ Creative flexibility and speed
- ▣ Huge canvases for engaging creative executions

Omnichannel Amplification

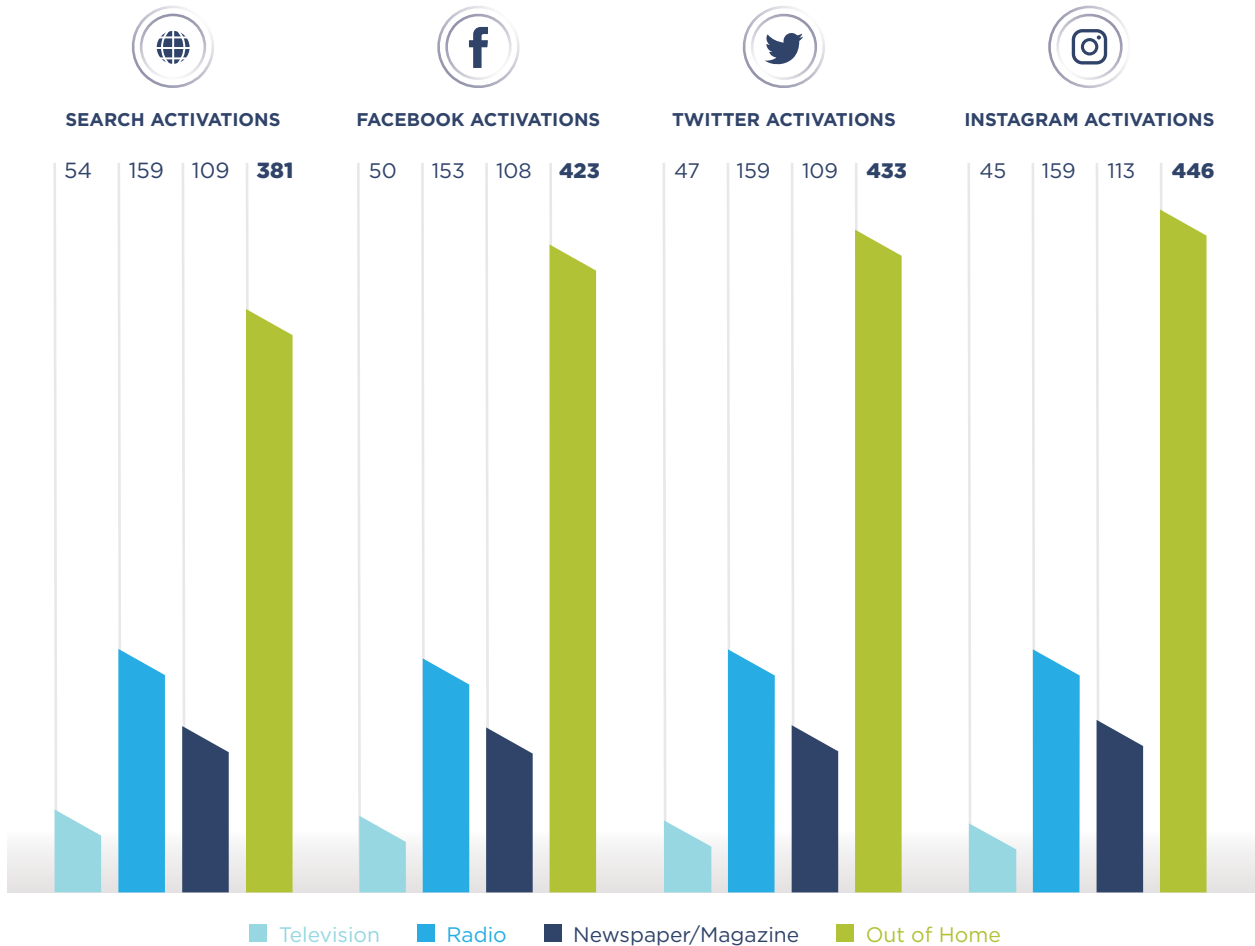
DOOH placements can reap even more benefits for advertisers when run with coordinated digital campaigns. “OOH campaigns boost online engagement more than other traditional media can,” says Nancy Fletcher, president and CEO of the Out of Home Advertising Association of America. “OOH’s connection to digital media is undeniable.”⁵

Having the ability to know with certainty the location of the placement allows for very specialized location-specific advertising.

According to studies from Nielsen, Analytic Partners, and OnDevice Research, DOOH in an omnichannel campaign:⁶

- Increases reach by as much as **303%** when added to mobile or web messaging.
- Drives 4x more online activity per ad dollar spent than TV, radio, or print, alone.
- Makes it **46%** more likely for consumers to engage with a brand on mobile.
- Increases online activations through search and social media **4x** the expected rate given relative ad spend in those media.
- Combined with social media messaging, lifts foot traffic by an average of **68%**. A study by Nielsen showed that **19%** of OOH viewers visit their local store or business after viewing an OOH ad.⁷

Online Activations Indexed Against Media Spend



Video + DOOH = Engagement

With moving images, DOOH campaigns afford advertisers further chances to put impactful and engaging content on attention-grabbing screens.

Full motion DOOH is 2.5x more impactful than equivalent static placements, according to one study.⁸ Short-form videos of just a few seconds are gaining particular traction. Short-form DOOH video, or SFVOOH, combined with mobile placements increases click-through rates (CTR) as much as 300%.⁹

Location, Location, Actual Location

In digital advertising “context” usually refers to on-screen adjacencies. With DOOH, context describes the ad’s placement in the real world — a beach, a highway, a supermarket. Knowing a screen’s geographic coordinates allows marketers to tailor messages to the environs and its audience, and the real-world circumstances, as noted above.

Messaging can flexibly conform to audience composition in specific locales at specific times, such as in malls populated by workers during business hours but families and teenagers on weekends.

PROGRAMMATIC IMPROVEMENTS TO DOOH

Throughout 2017 and 2018 there has been a marked increase in interest among clients and agencies in applying digital audience buying principles to traditional channels. Marketers are attracted to programmatic DOOH by the significant gains in efficiency they can achieve over traditional OOH and even previous DOOH placements.

No longer must they contact a network owner directly to negotiate the details and terms of the campaign, discussing pricing, availability, audience targeting, and other important variables. They also avoid the labor-intensive tasks involved in manually scheduling the campaigns on the networks. Programmatic automation removes many of these steps.

Media buyers can simply access a network’s inventory and book the screens they want, when they want, according to defined price and established criteria. Programmatic enables sales of DOOH inventory via:

- ▀ **Real-Time Bidding**
- ▀ **Programmatic Guaranteed**
- ▀ **Private Market Places (PMPs)**

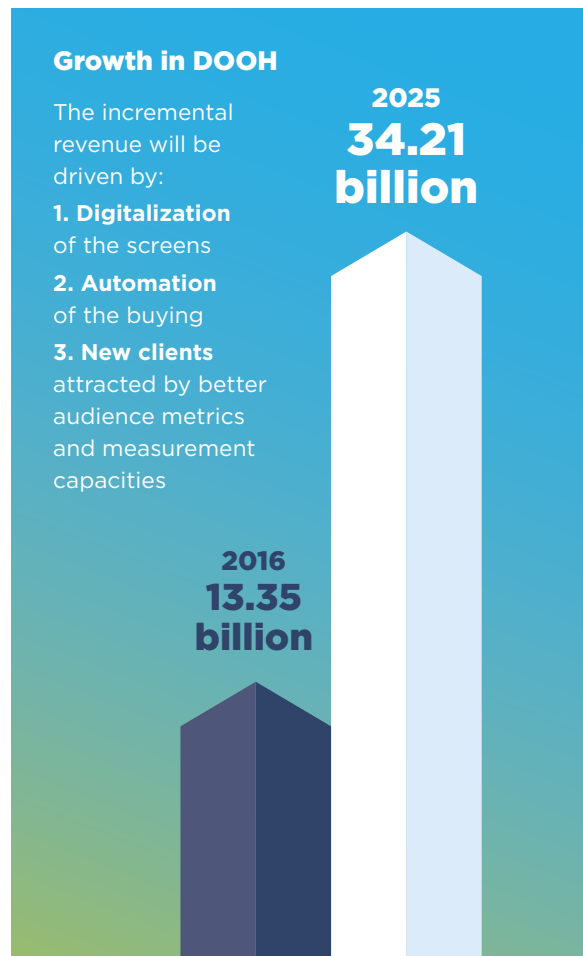
Growth in DOOH

The incremental revenue will be driven by:

- 1. Digitalization** of the screens
- 2. Automation** of the buying
- 3. New clients** attracted by better audience metrics and measurement capacities

2016
13.35
billion

2025
34.21
billion



Sharper Measurements

Effectively integrating and targeting DOOH audiences within a digital campaign requires the expertise to calculate across platforms, correlating statistically valid inference and delivery metrics to the one-to-one targeting methodologies used in programmatic platforms.

Buyers can use impression multipliers — calculations that map anticipated exposures to audiences— to achieve the proper measurement of targets chosen inside a DSP. The new attribution models are further adding measurement capabilities to let advertisers understand and optimize for outcomes-based pricing well beyond OOH's traditional CPM models.

New Technologies

As data gathering and analysis improves, marketers will also soon be able to capitalize on DOOH experiments that are adding AI and machine learning to the mix. Data from DOOH campaigns is already being combined with data available from other advertising technologies to inform campaign targeting, measurement, and optimization.

See “The Xaxis Guide to Programmatic DOOH” beginning on page 14 of this document for more on how to structure and target a DOOH campaign.

The consummate one-to-many channel is gravitating toward the measurability and accountability that marketers seek.

CHALLENGES OF DOOH

As the DOOH market evolves and matures, and more screens become available through programmatic platforms, marketers trying to seize the opportunities still confront a number of challenges.

Measurement Currency

One of the key wrinkles in targeting and programmatic platforms for DOOH comes from the impression multiplier. The impression multiplier, originated for planning purposes, has served as a useful proxy for impressions since before widespread adoption of digital out-of-home buying. It has allowed DSPs and third-parties operating with them to calculate, measure, and buy relatively similar audiences across all digital screens, including DOOH.

But the impression multiplier is *only* a proxy, and an insufficient one at that. It gives only approximations, not true targeting, nor

does it measure impression results. And even were it to accurately measure passers-by and determine who has viewed an ad, giving one-to-one results that match other digital capabilities, it would still not deliver what advertisers really need: outcomes, the ability to determine what ad spend results in which desired actions beyond the exposure to the message.

Like all digital media, DOOH would be well-served to hook its measurement capabilities to the real business outcomes marketers desire.

Impression, Defined

In OOH an “impression” is counted when an individual views an ad at a given time in a given space, and without duplication (to avoid double-counting).

Fragmentation

Most of the top OOH vendors have started to offer DOOH opportunities through programmatic integrations with DSPs and related providers. But the market is still remarkably fragmented, with different networks available through different platforms and providers, and some networks only partially available even when they do participate in programmatic buys.

There is no unified targeting, measurement, or even vocabulary to ease media buyers' access to inventory across providers. Offerings vary further by geography, requiring more manual work to unify campaigns across borders. Some markets have not incorporated impression multipliers into DSP interfaces, requiring the publisher or media buyer to manually calculate in order to normalize a campaign, or to employ a third party to do so.

Variables that influence pricing, too, are not fully transparent. The lack of precision in DOOH has hindered marketers' ability to efficiently implement and assess the worth of DOOH in their broader campaigns.

Finally, while executing a buy in a little as an hour is a paramount improvement, "real-time" DOOH executions are not, in fact, real time.¹⁰

The Impression Multiplier

Intelligently measuring delivery of DOOH placements programmatically via a DSP can require implementing a variable called the "impression multiplier."

Most DSPs are designed for one-to-one audience buying using cookies or mobile IDs as identifiers. Audience targeting decisions are based on an individual ID's attributes fitting a set of requirements specified by the media buyer, such as demographic data and price. But DOOH placements don't have these one-to-one capabilities.

Suppose an ad call results in the ad being served to six elevators, each of which on average has three people in them at that time, for an estimated total of 18 impressions. Data from independent third parties provides both the numbers of people and their audience composition, correlated to day and time.

Because user IDs are not available to the DSP, it is instead given the parameters for the placements to allow for decisioning according to the specified requirements, and will bid on them accordingly. Some DSPs are also incorporating aggregated and anonymized mobile data to further inform placements.

Using an impression multiplier in this way has the added benefit of helping partners and owners of different media report comparable numbers and avoid discrepancies.

TOWARDS A SOLUTION

The good news is that sophisticated media planning, buying, and technology partners (such as Xaxis) are deriving solutions with available techniques and technologies, offering bundled pricing that drives cost-efficiencies and delivers outcomes well beyond what can be accomplished with fragmented spot buying.

An emphasis on business outcomes and omnichannel strategy can help marketers overcome the challenges of fragmentation. Omnichannel techniques — which include the strategic coordination of new technologies and messaging opportunities across each component of a campaign — can build progress toward a stronger holistic outcome. DOOH serves a crucial — but not singular or separate — role in this approach.

MARKETERS ARE ABLE TO USE OUTCOME-DRIVEN, CROSS-CHANNEL TECHNIQUES TO:

Capture Audiences by syncing media planning with a mobile campaign to reach users in areas with few OOH opportunities or where OOH is cost-prohibitive.

Conquest and Defend, leveraging location to identify target competitor audiences or build loyalty for existing customers, then determine the most relevant DOOH buys from movements after exposure.

Direct consumers by measuring the impact of campaigns on store visitations, the footfall to stores — both owned and competitors'. Measurement of uplift in real-time of DOOH is enhanced through precise purchase and address data.

Amplify by running DOOH campaigns with cross-channel initiatives. For example: Re-engage audiences in lean-back environments on different devices when most relevant for purchase cycle understanding or retarget them with sequential or different devices after DOOH exposures.

The above is accomplished through skillful, concurrent use of technologies that can tag sites, capture devices within mapped boundaries, layer audience segment information such as demographics and media consumption behavior, enable programmatic mobile media, and, post-exposure, conduct campaign analysis and gain audience insights through quantitative and qualitative means.

Marketers may choose to measure any number of factors that are relevant to their campaign such as brand lift and recall, change in purchase intent, or more direct actions such as footfall analysis and digital media behaviors.

The Power of DOOH

A study done of the Italian market illustrates the potential power of DOOH, especially when integrated with a programmatic media buy:



52%
of people pay attention to OOH advertising



OOH is the **third-ranked** medium in time spent at **1h 56m** on average (after TV and personal digital screens)



The number of OOH screens grew **27%** from 4,700 in 2013 to 6,000 by 2017.

Source: "Real DOOH," GroupM & Kinetic, 2018

CONCLUSION

PROGRAMMATIC DOOH DRIVES OUTCOMES

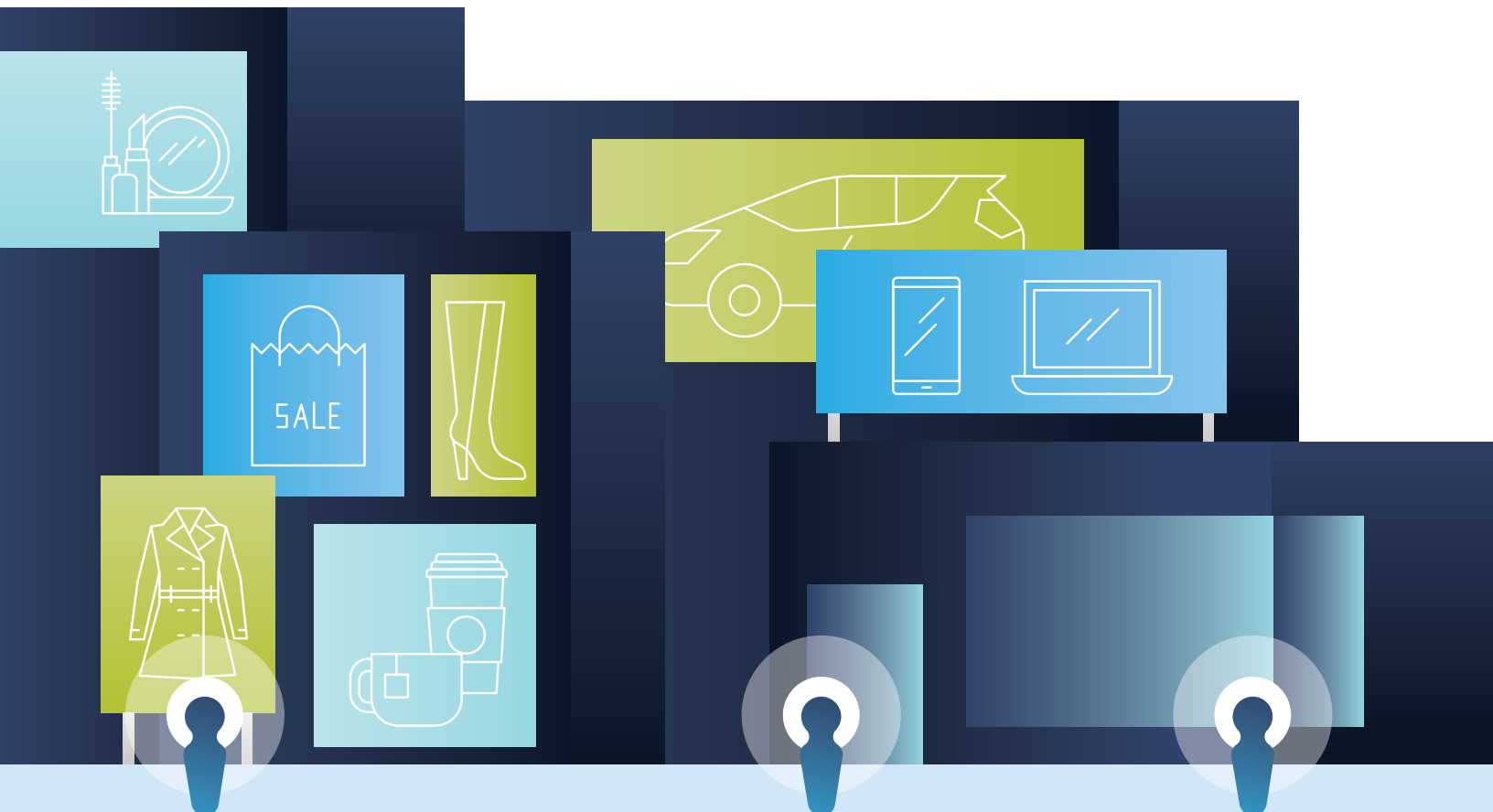
For marketers, DOOH is better than it's ever been, and the capabilities are set to improve even more.

More platforms are integrating DOOH into their programmatic buying processes and adding it to their measurement schemes, tracking everything from brand lift to footfall to added lift from mobile messaging combined with DOOH. Marketers using DOOH are increasing the effectiveness of other budgets and spend and deploying DOOH for cross-channel amplification.

Soon, marketers' expectations will change. They will not accept targeting and measurement that doesn't give them the means to fully understand their ROI.

DOOH is about to reach a tipping point. The consummate one-to-many channel is gravitating toward the accountability, attribution and effectiveness that marketers seek.

Already, with savvy planning, buying, and execution through programmatic platforms, and careful measurement and optimization, marketers can use DOOH to capture the value of out-of-home impressions, getting closer to the real outcomes they desire. Budgets are shifting as more OOH opportunities become digital and new ones are added around the world. Thanks to DOOH, out-of-home advertising this year will command 6.3% of worldwide advertising budgets, the highest share since 1999.



CASE STUDY

FOOT TRAFFIC TO INDIAN RETAILERS

Effectiveness showed marked increases due to DOOH exposures, especially in tandem with mobile. In addition, KPIs showed significant improvement as learnings from the previous week were incorporated into the campaign.

Key Campaign Goals: Expose key audience segments via integrated marketing techniques in order to encourage visits to retail outlets.

Key Audience Segments: Fashion enthusiasts, shopping enthusiasts, mall visitors, upscale apartment residents.

Methods Used: Target and retarget key segments. Negatively target those not in key segments. Manage media across digital, mobile and DOOH placements. Use DOOH media to direct shoppers, capture new interest, conquest competitors, and amplify other messaging.

Store Visitations

■ Week 1 ■ Week 2

Not Exposed to DOOH

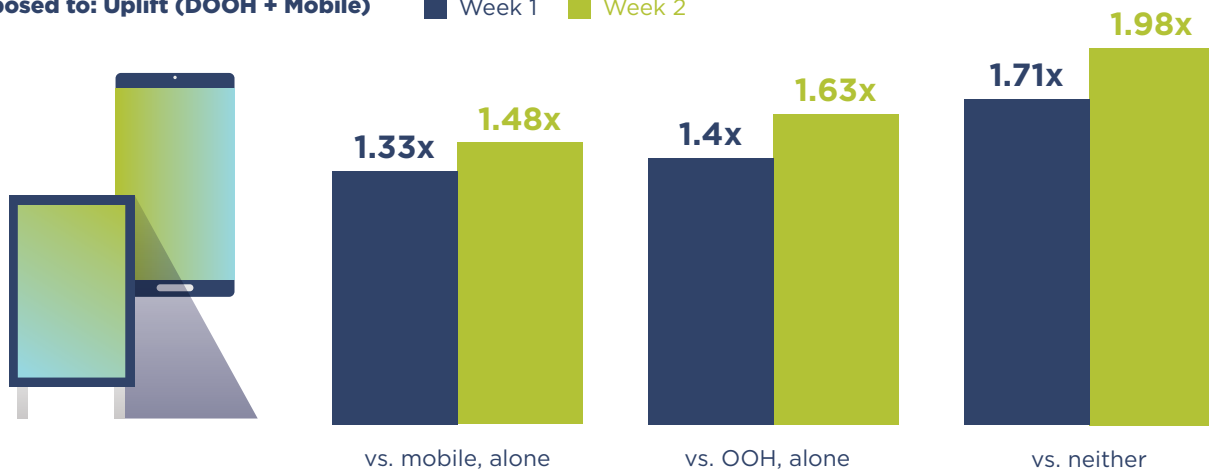


Exposed to DOOH



Exposed to: Uplift (DOOH + Mobile)

■ Week 1 ■ Week 2





BEST PRACTICES

THE XAXIS GUIDE TO PROGRAMMATIC DOOH

A step-by-step guide to strategizing, executing, building, and measuring a programmatic DOOH campaign.

GETTING STARTED: STRATEGY-DRIVEN DECISIONS

In developing a DOOH campaign, marketers are best served to first make crucial decisions that will guide every subsequent step.



CAMPAIGN OBJECTIVES

What is the ultimate end goal for the DOOH signage: branding, awareness, increased sales, special promotion? Make sure to know what success looks like before starting.



CAMPAIGN KPIS

Ensure your chosen metrics help you meet your campaign goals, that they measure toward the campaign objectives.



CAMPAIGN TIMING AND DURATION

Is your timeline tied to any external or internal factors? Perhaps there's an event, a sales initiative, a holiday.



DAY PARTING

What specific days or time of day would you like your ad to run?



BUDGET

How much, and how flexible moving to and from other media?



TARGET AUDIENCE

Make sure to choose signage locations that are seen by the intended audience.



VENUE TYPES

In what kind of venues (airports, malls, train stations, roadside billboards) would you like your ad to appear? Keep in mind that venues have varied protocols, so make sure your ad platform can help navigate those logistics.



DIGITAL SCREENS

Your content size, orientation and its corresponding resolution, as well as proper text size, are not to be overlooked and can have a huge impact on the perception of the ad on given screens.



DIGITAL AD FORMATS

Choose from motion or static and double-check restrictions to avoid issues later.



AD CREATIVE DURATION AND PLAYOUT

What is the duration the ad should run each time it displays in a rotation?



AUDIO

Will there be audio? How does the environment affect the sound and sound quality?

TACTICAL CONSIDERATIONS: CONTENT AND TECHNOLOGY

Each campaign has unique strategies associated with its goals. It is important to consider and define the capabilities of your technology to deliver the best results for each campaign. Consider these parameters:

BROADCASTING

When campaigns are aimed towards reaching the largest audience possible, content is typically run across a group of displays, even all available locations. Broadcasting is usually seen with editorial content or automated content such as RSS feeds.

TARGETING

Campaigns generally require strong targeting to produce strong ROI. Target displays based on geographical proximity, demographics, display size, language, and more. For example, a beer company might want to target bus shelter and roadside screens close to a sports arena a few hours before a big game. The size and distance of those screens might influence the creative, as noted in the previous section.

INTERACTIVITY

Viewers might need to interact with the display. With wayfinding, for example, visitors can touch screens to find their destination. Some DOOH executions also have interactive shoppable touch elements.

SEQUENCING AND RELATIVE ADJACENCY

Content in sponsorship or co-marketing campaigns might need to be played in-sequence.

SATURATION AND SEPARATION

On the other hand, some content needs to be spaced as far apart in a loop as possible, as in the case of competing products.

SYNCHRONIZATION AND TRIGGERS

Content can also be synchronized across multiple displays. For example, slots from one campaign can trigger a campaign on another set of displays. This trigger could also come from third party technology such as a GPS device.

MULTI-SCHEDULING

Slots can play different messages based on the day, time, or date. For example, a restaurant might show a breakfast menu in the morning, then a regular menu airs after 11 a.m. with daily specials.

LOCATION CUSTOMIZATION

Some content may be customized based on location. For example, a message can be customized to show local pricing.

TRIGGERS

Creative elements or delivery can adjust based on external triggers or information, such as changes in weather.

DWELL TIME

Dwell time is the amount of time that an average person is expected to spend in an area where your advertising will be displayed. Examining that data can help you create more engaging content. For many advertisers, brand recall is one of the major goals of DOOH media campaigns. When measuring brand recall, dwell time is an important metric. By looking at dwell time, ad impressions, and audience demographics, you can learn not just about who is looking at your ads, but also how much of the ad they're likely to view. This can help determine the optimal length, tone, and messaging of your creative.

TARGETING IMPERATIVES

There are multiple approaches to targeting based on a campaign's strategy and intended audience.

PROXIMITY

One of the easiest ways to leverage audience targeting for success in digital out-of-home is to build audiences based on individuals who have been to a specific place of interest. Typical applications of proximity targeting include:

- Reaching shoppers who have visited an advertiser's stores in the past month.
- Targeting individuals who have visited a competitive brand's locations within the past month.
- Using related points of interest to find relevant consumers. For example, an insurance provider might target an audience of individuals who have visited doctors' offices.

BEHAVIORAL

Audience targeting in online marketing channels such as display and video use browser-based cookies to allow marketers to define relevant audiences for targeting according to consumer behaviors. In DOOH, real-world signals help marketers construct behavioral audiences. For example, an audience of "regular coffee commuters" might be based on individuals who visit a specific morning beverage retail store 3+ days per week as well as transit locations during morning and evening rush hours.

VERTICAL

Specific types of brands can use DOOH to target by carefully determining how they can reach intended audiences using available technologies. One luxury travel brand, for example, targeted customers in airport waiting areas of select flights to relevant locales.

MANAGING BUDGET AND VENUES

As with some programmatic media, programmatic DOOH inventory is non-guaranteed. To ensure successful campaign execution and full budget delivery, there are a few important factors to keep in mind.

MULTIPLE VENUES

Try not to limit a campaign to a single venue type. In order to successfully reach intended consumers across multiple touchpoints throughout their day, include at least three types of venues. Data from past campaigns indicates that leveraging a multi-venue strategy dramatically increases the impact of campaigns.

FLUID BUDGETS

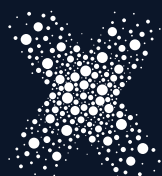
Since the programmatic inventory is non-guaranteed, keep budgets fluid across venue types to maximize reach. With a fluid budget setup, you can easily shift impressions to available inventory across different venue types as needed and optimize toward high performing areas. Keeping budgets fluid provides flexibility to reallocate spending to ensure campaign goals are still met even as conditions change.

MARKETPLACE DEALS

If campaign objectives dictate running on a limited number of screens within a specific venue type, connect with the DSP and/or the media owner to discuss negotiating a flat CPM for a custom package of inventory. Marketplace deals can be an excellent complement to audience-based buying on an exchange.

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XAXIS

THE OUTCOME
MEDIA COMPANY

Xaxis is The Outcome Media Company. We combine unique brand-safe media access, unrivalled programmatic expertise, and 360-degree data with proprietary artificial intelligence to help global brands achieve the outcomes they value from their digital media investments. Xaxis offers managed programmatic services in 47 markets, including North America, Europe, Asia Pacific, Latin America, the Middle East, and Africa.

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