

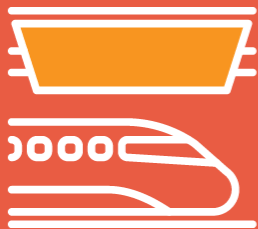
iab.
australia



WEBINAR
SERIES

DIGITAL OUT OF HOME

FROM GO TO WHOA



THIS WEBINAR WILL BEGIN SHORTLY

AGENDA

- Introduction (11:05 - 11:10)
- From Brief to Activation - for traditional and digital buyers (11:10 - 11:30)
- Measurement & Verification (11:30 - 11:40)
- Consumer Trends - Back into the World! (11:40 - 11:50)
- Q&A (11:50 - midday)



AMOBEE

bonzai 

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 Broadsign


HUMAN
TRAFFIC

IAS Integral
Ad Science

MediaMath

tonic
HEALTH MEDIA

OMG Omnicom
MediaGroup

VERIDOOH

rubicon
PROJECT

verizon
media 

 SHOPPER
MEDIA GROUP

DIGITAL OUT OF HOME ADVERTISING

GLOSSARY OF TERMS



IDENTIFIED ~~BARRIERS~~ OPPORTUNITIES

US / CANADA

1 EDUCATION

95% of participants identified education as a key driver for future growth

2 FRAGMENTATION

60% highlighted fragmentation as a reason for restricting media spend in pDOOH

3 STANDARDIZATION

43% identified the lack of data standardization as a key inhibitor to pDOOH

AUSTRALIA

1 EDUCATION

2 QUALITY & TRANSPARENT AUDIENCE DATA

3 AUDIENCE & EFFECTIVENESS MEASUREMENT

Source: PwC/IAB Growing Programmatic DOOH, Aug 2019

FROM BRIEF TO ACTIVATION



Trisia Wiecek
MediaMath



Jo Dick
OMG

WHERE TO START?

1. OBJECTIVES
2. TIMING & PACING
3. BUDGET
4. TARGET AUDIENCE
5. CROSS MEDIA ACTIVITY

HOW TO BUY - Direct

The Brief to the OOH media owner

- Format
- Active weeks
- Markets
- Target Audience
- May brief that it is to be 100% digital
- \$ amount
- Objectives
- Analyse responses
 - sites, cost, bonus, CPM (MOVE data),
 - cost per minute, plays, SOV
- Negotiate
- IO completed by the media owner (not standardised across the industry)
- Book it and enter the amounts into financial system
- Monitor / verify the campaign is appearing as booked



HOW TO BUY PROGRAMMATIC

Programmatic can be bought through different methods:

- Private Marketplace
- First Look
- Programmatic Guaranteed

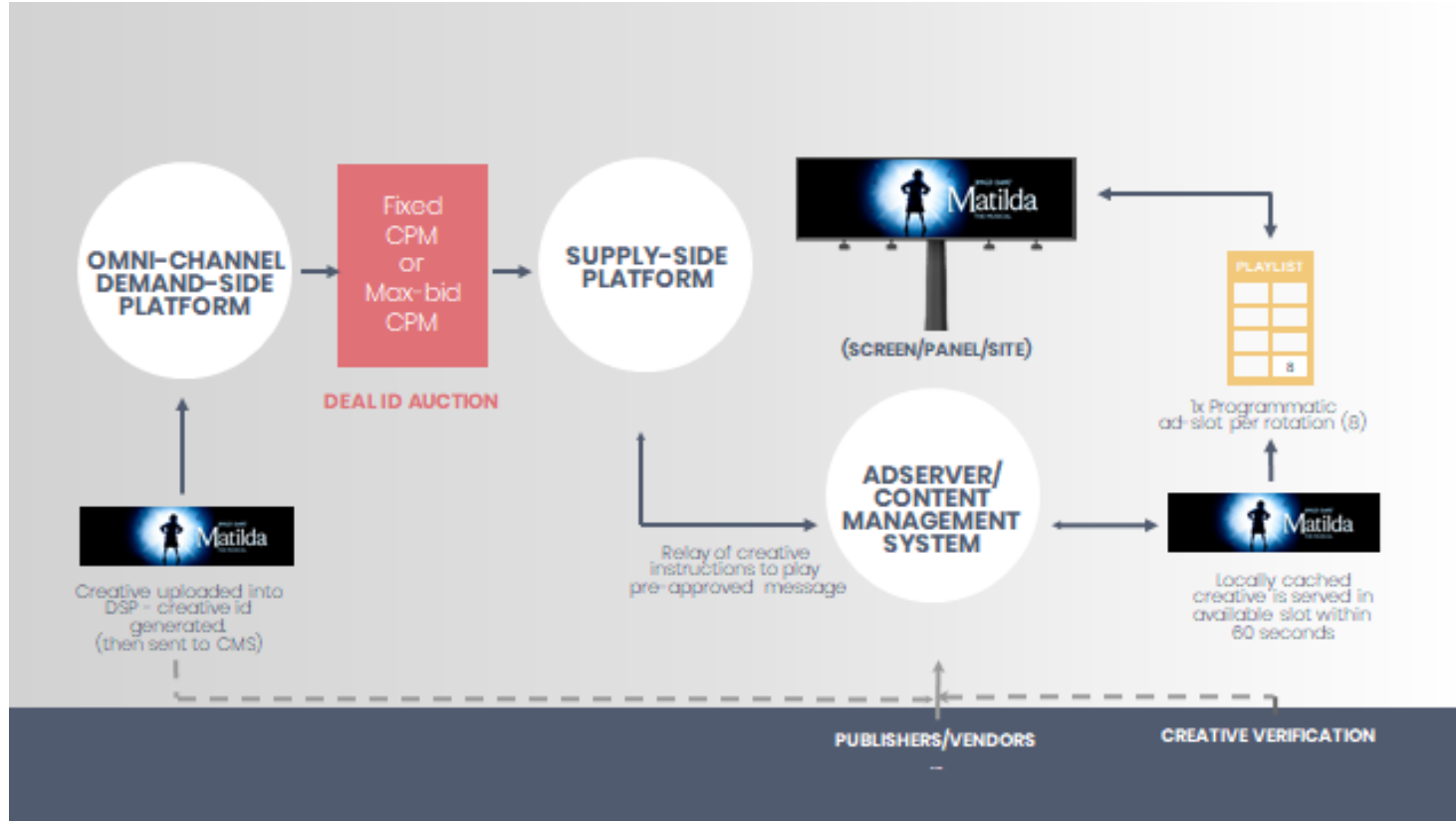
Programmatic is purchased on a fixed or floor CPM, not Share of Voice or Loop Frequency.

All transactions require a Deal ID, provided by the supplier.

PLAY \approx ~~≠~~ IMPRESSION

1 x Play will = many impressions

PROGRAMMATIC TRANSACTION CYCLE



HOW IT DIFFERS FROM “NORMAL” PROGRAMMATIC

	Programmatic DOOH	Other Programmatic Channels
Real time bidding	Auction occurs ~1 minute in advance of the loop starting. (Between 15 seconds and 5 minutes)	Auction usually results in almost instant ad rendering. Some channel and format specific exceptions.
Ad Stitching	Two options: <ol style="list-style-type: none"> 1. Via a Direct API integration - <i>all spots visible to programmatic buyers.</i> 2. Via the creation of a HTML file that sits in the loop - <i>dedicated spot visible to programmatic buyers.</i> Waterfall in place, with direct buys being prioritised.	In the very early days, inventory was remnant with a strict waterfall in place. With the rise of header bidding, programmatic buyers have comparable access to direct buyers.
Creative Files	Many different sizes with reasonable reach. File type needs to be verified and can be unexpected.	A few creative dimensions and durations dominate and are predictable.
Rotation	Share of Voice depends on the number of spots in the loop, and this can change.	A set number of ad slots on the page or within the player.
Bidding & Impressions	A won auction can result in multiple impressions.	A won auction can result in only one impression.
Measurement	User IDs are not present in the bid request. Measurement partners need to be engaged for attribution and reach/frequency measurement.	The user ID present in the bid request allows for online or offline actions to be attributed in the DSP, and unique reach to be measured.

* Assuming the DSP supports the impression multiplier.

STRATEGIC CONSIDERATIONS FOR TRADITIONAL OOH

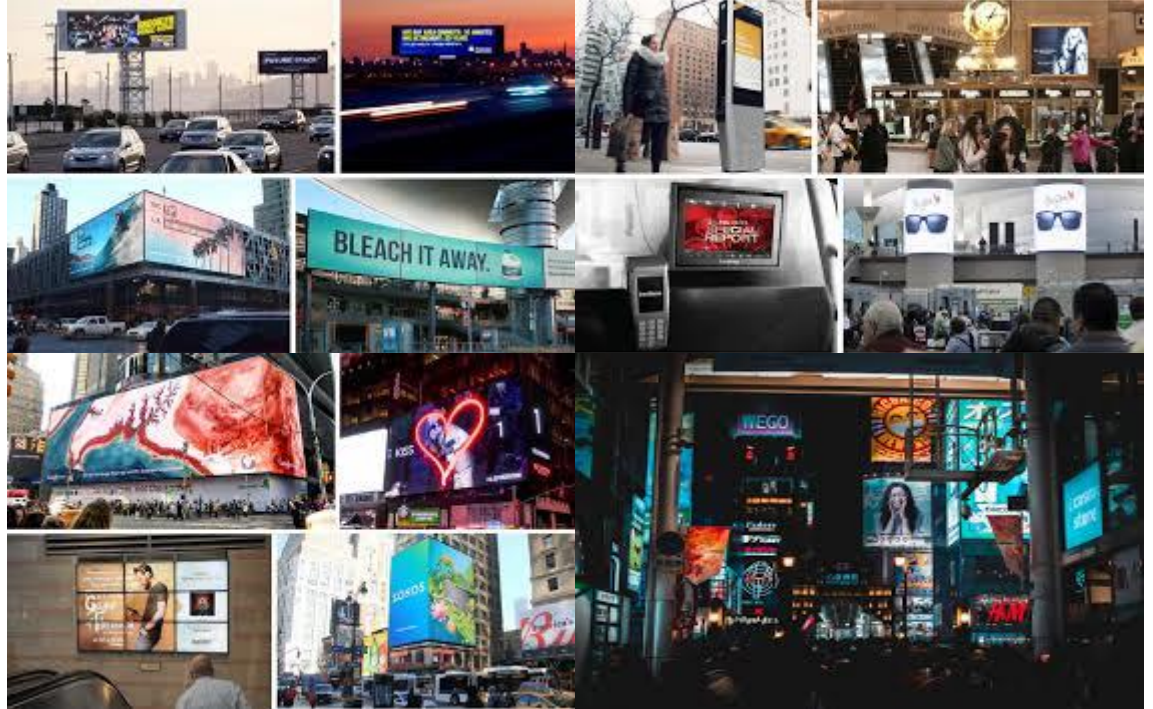
FLEX
VS
ALWAYS ON

WHAT TO BUY?

SCREEN TYPES

- Retail
- Roadside
- Rail
- Street furniture
- Petrol Stations
- Gyms
- Offices
- Medical waiting rooms

& more.....



DAY PARTING & FLIGHTING

From a **programmatic** perspective, the user can specify the following in the DSP:

- Daypart(s)
- Weekday(s)
- Weekpart
- Flight date(s)

Considerations:

- Creative Personalisation or Flighting
- Budget Flighting or Weighting
- Impression Multiplier support and bid impact.
- Time Zones and IP Address

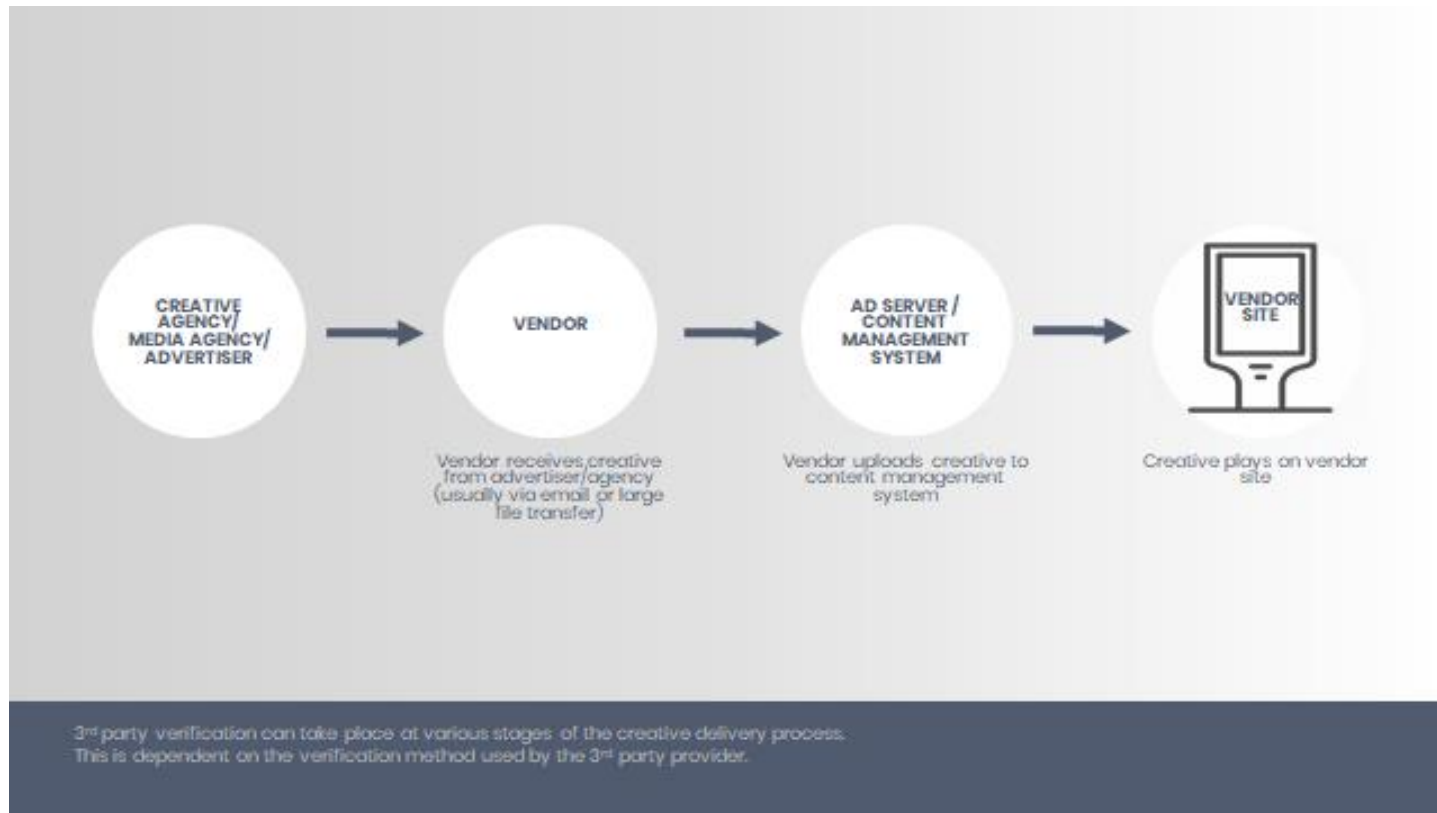
TARGETING

- **Location** (*passed through the bid request*)
- **Audience Concentration** (*use 1P, 2P, 3P data for scoring screens & times*)
- **External Data Sources** (*e.g. sports scores, traffic, weather*)

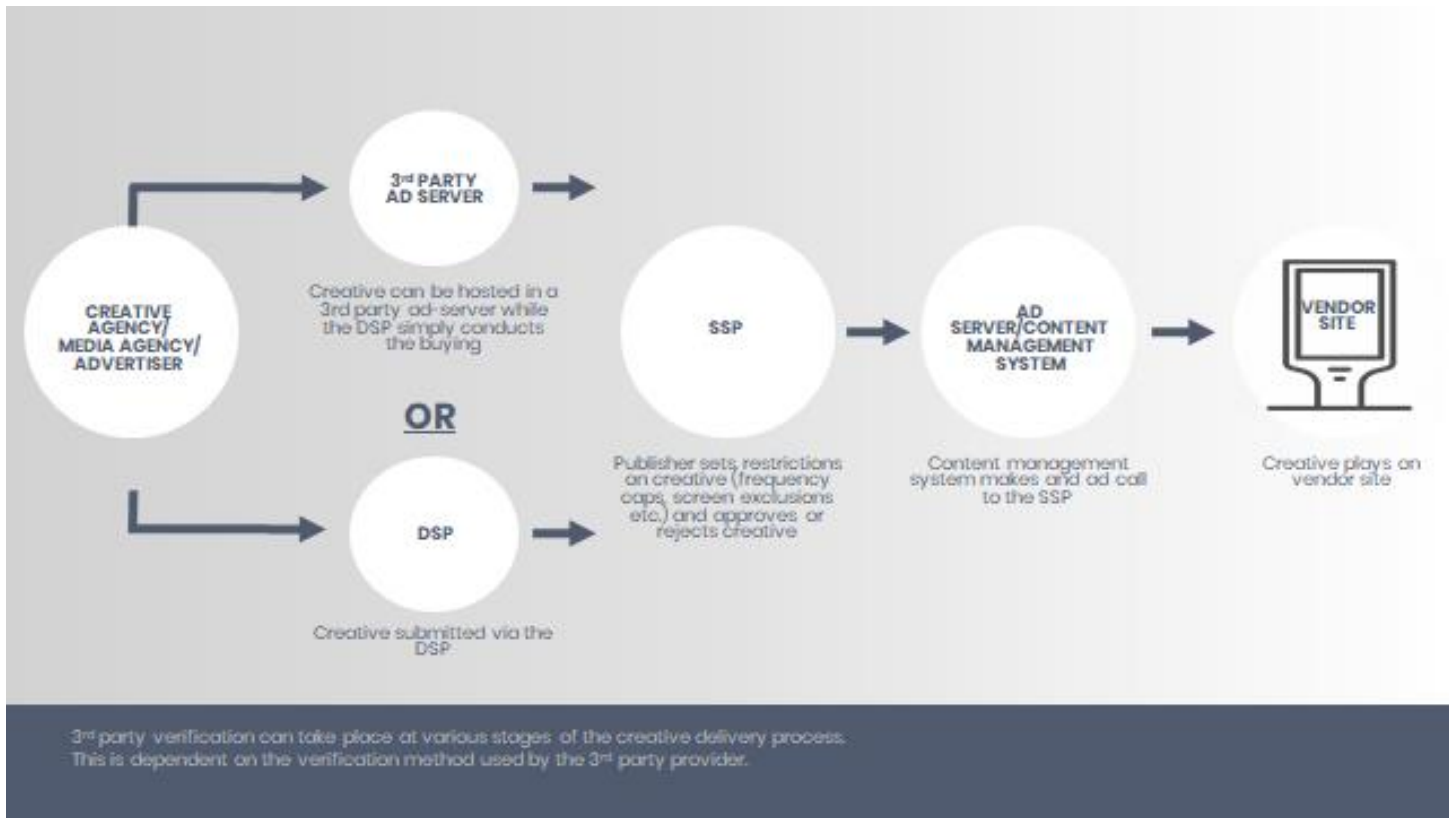
CREATIVE

- Motion / non motion
- Range of assets (Sizes)
- Deadlines
- Approval process (as part of the Media Owner contractual obligations)
 - OOH specific approvals and restrictions
 - Gambling
 - Alcohol
 - New ... Junk Food

CREATIVE FLOW - DIRECT



CREATIVE FLOW - PROGRAMMATIC



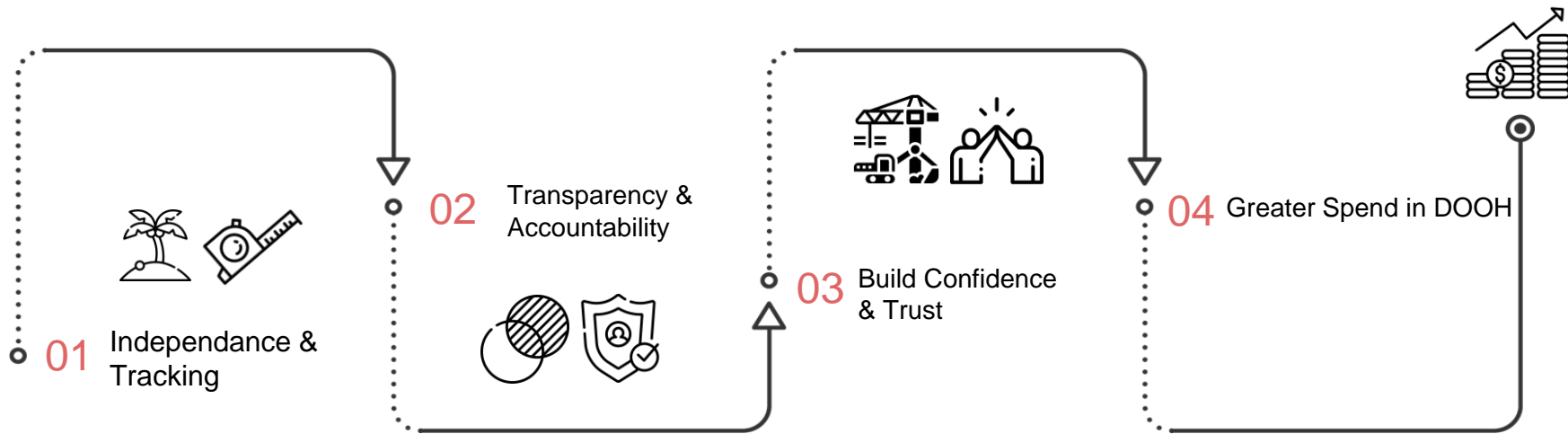
VERIFICATION



Mo Moubayed

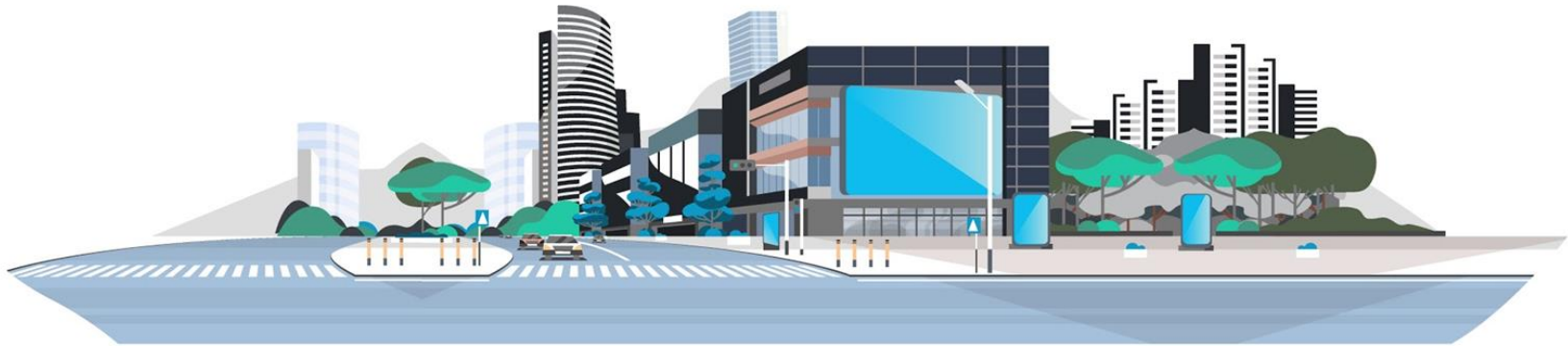
Founder
Veridooh

VERIFICATION - WHY?



VERIFICATION - TYPES?

- Physical Inspections
- Proof of Play reports and Aggregators
- SmartCreative tags



WHAT ARE YOU BOOKING?

- Number of Panels
- Location of Panels
- Ad length
- Share of Time
- Creative



WHAT SHOULD BE TRACKED AND VERIFIED?



- Panels
- Locations
- Plays
- Ad length
- Exposure Time
- Share of Time
- Creatives
- Breakdown by day

HOW DO YOU KNOW YOUR CAMPAIGN WAS DELIVERED AS YOU BOOKED?

Total Panels / Booked Panels

164 / 142

Total Plays / Booked Plays

8,900,498 / 11,764,802

Total Exposure Time / Booked Exposure Time

1,381,017m / 1,882,241.1m

Delivered Booked Panels



Delivered Booked Plays



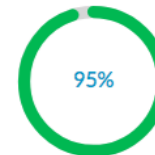
Delivered Booked Exposure Time



Ad Length Accuracy



SOT Accuracy



MEASUREMENT



John McNerney
Director, Platforms ANZ
Verizon Media

THE MEASUREMENT PURPOSE

The digital norm we're used to;

1

Know a user can see an ad when displayed on any screen or device.

2

Having accurate demographic and audience behavioural signals for exposed users.

3

Omnichannel measurement across devices for attribution and frequency.



The DOOH difference

Challenges with DOOH exposure at the same level of granularity

There is a reliance on new and different datasets to match against these audiences.

OOH measurement today isn't suitable for many digital use cases.

THE DOOH IMPRESSION

The Audience behind the screen = Impression Multiplier



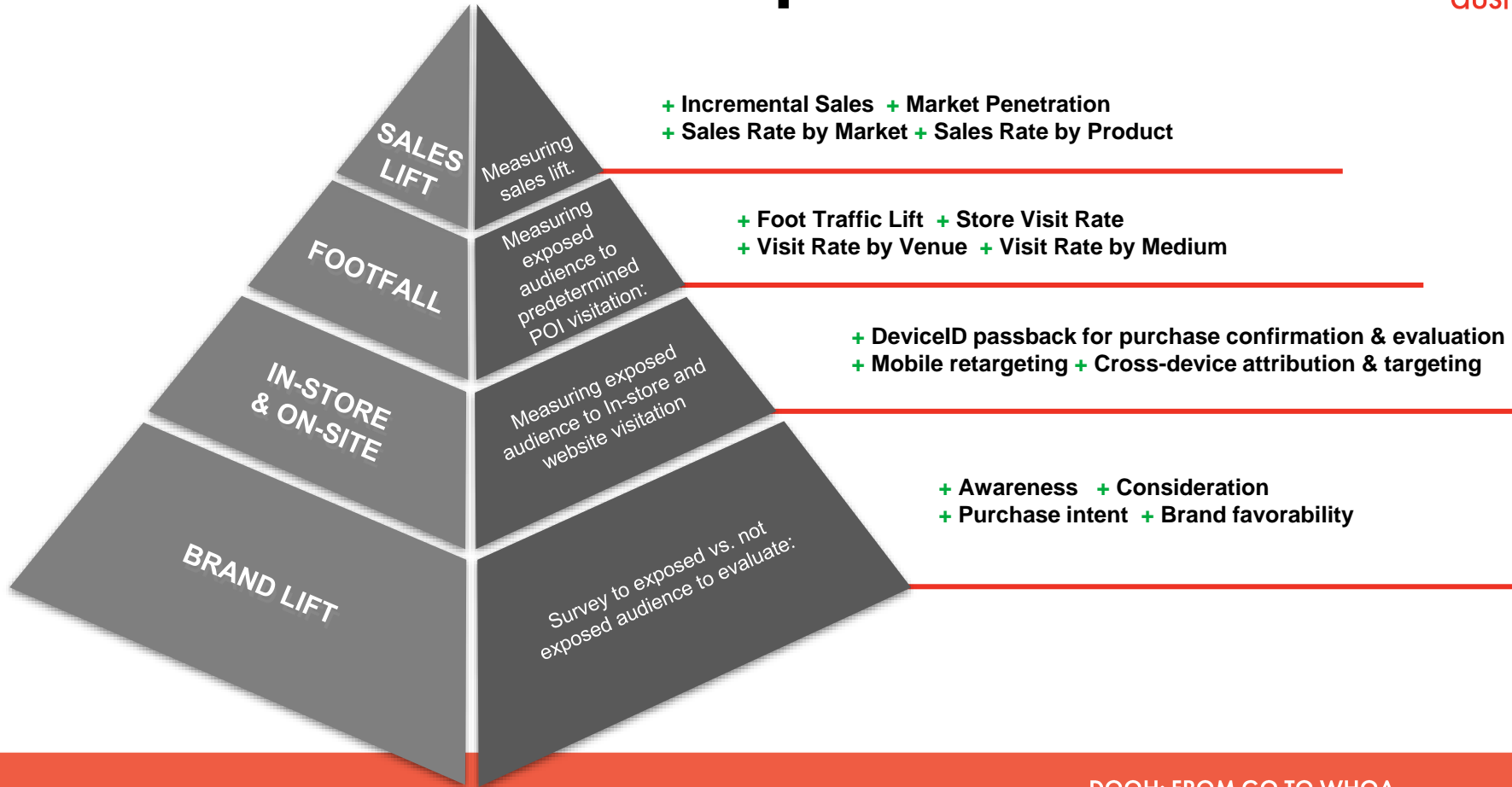
Impression Multiplier is a value passed on the bid request from an Exchange/SSP that signifies the # of users likely to actually view the Ad Play or the Audience Impression Count

- > 1, i.e. 22 if it's a screen in a gym
- < 1, i.e. .5 for a roadside billboard that doesn't always have a car passing by it

In many cases, the true Deal Floor Price is negotiated Floor Price X Impression Multiplier

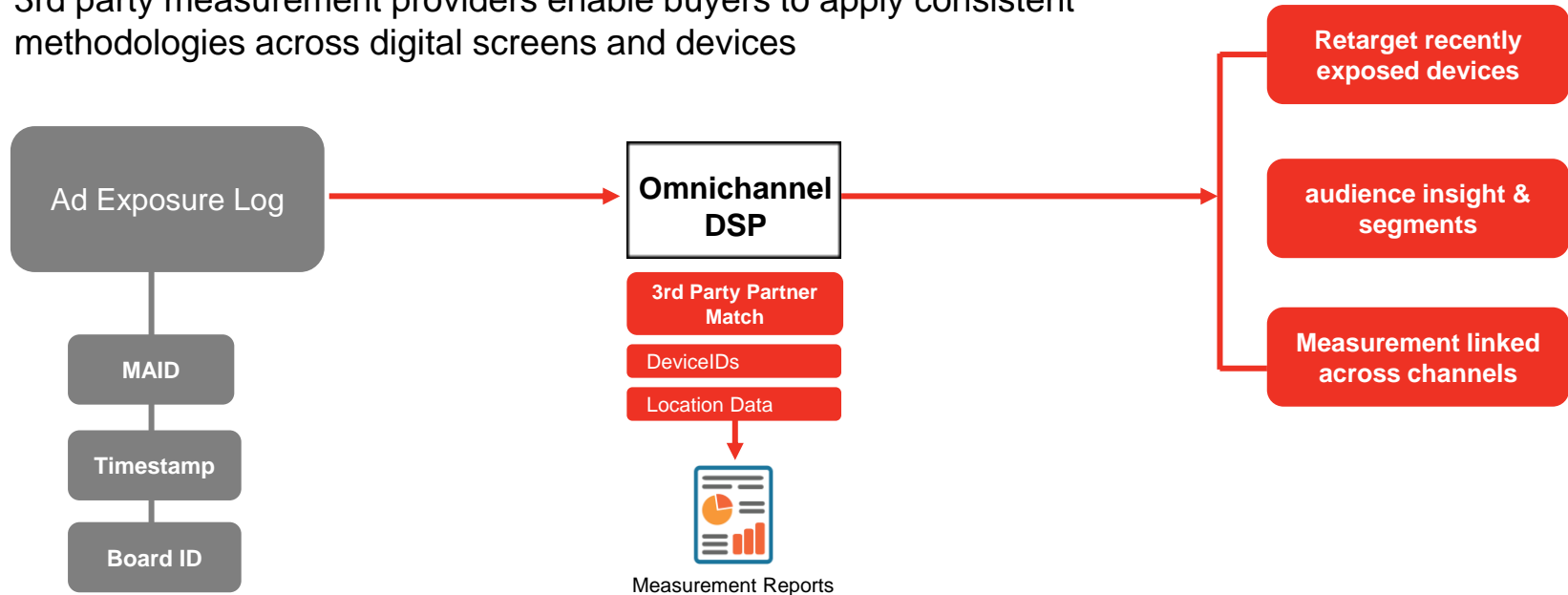
Floor Price is \$3, impression multiplier is 10, true Deal Floor Price is \$30

DOOH Measurement Options



3RD PARTY MEASUREMENT

3rd party measurement providers enable buyers to apply consistent methodologies across digital screens and devices



CONSUMER BEHAVIOUR & COVID-19 RECOVERY



Alicia Placer
Blis



Harry Lam
Blis



Real Life. Mapped.

'Life After Lockdown' Snapshot

Blis Insights

Alicia Placer | Head of Partnerships
Harry Lam | Insights Manager

Private and confidential.

Your **location-powered** advertising & analytics partner



Improving consumer engagement and delivering measurable sales uplift

A dark grey world map with several colored dots (teal, orange, yellow) indicating office locations across North America, Europe, and Asia.

40⁺ offices worldwide | **75** markets | **230⁺** employees



We're experts in understanding **human behaviour**



We make mobile **location data** actionable



We improve sales and marketing performance



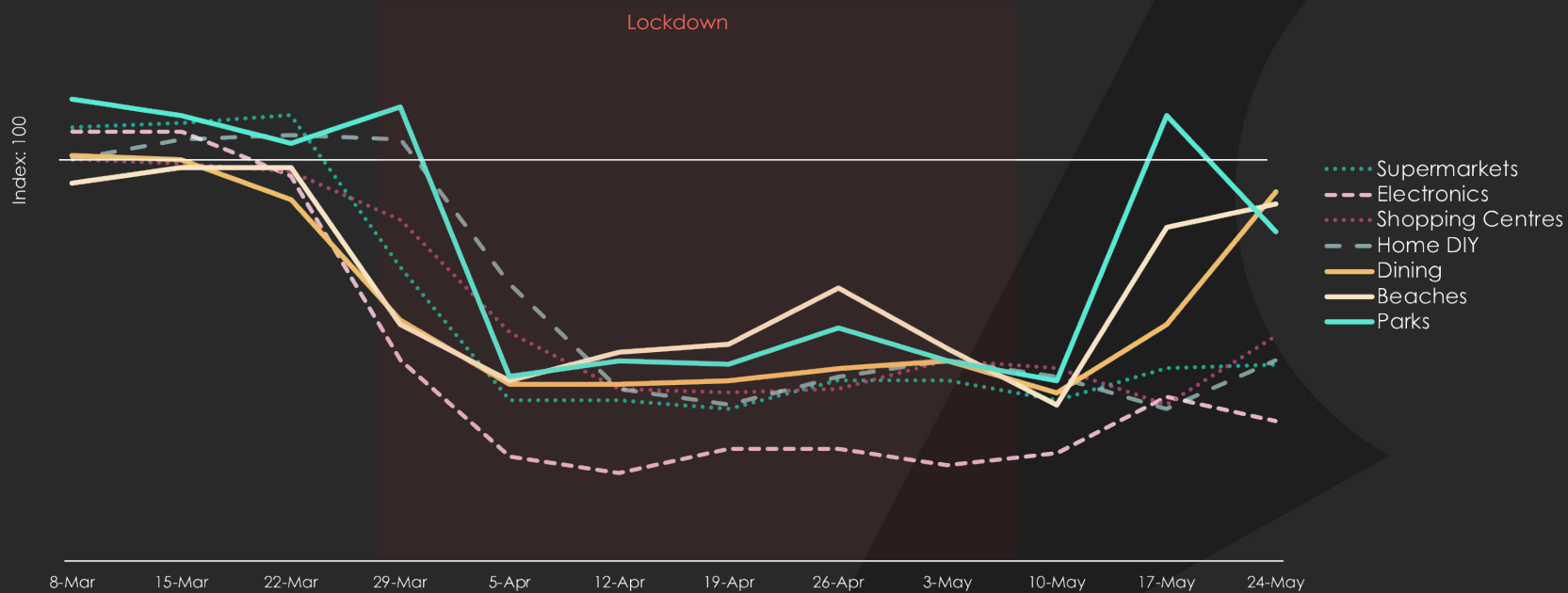
We're **GDPR** and **CCPA** compliant

Australia is emerging from isolation

And meeting social and well-being needs are early priorities



Indexed Footfall | Indexed vs Week Ending 1-Mar

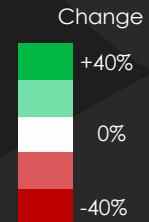
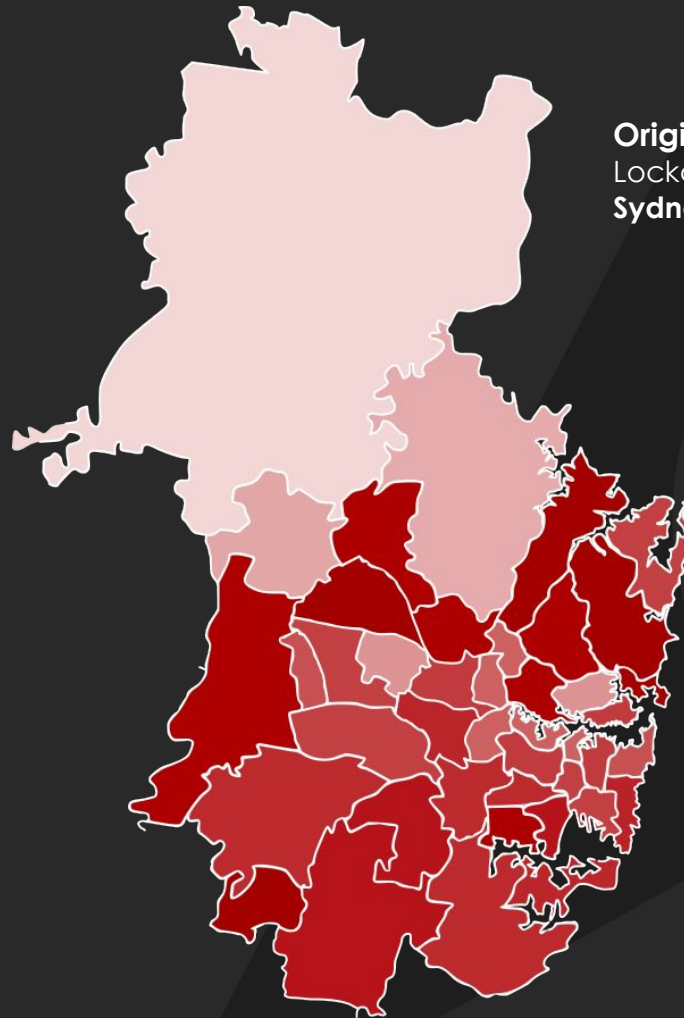


'Recovery' is occurring at *different* speeds

Origin of Car Dealership visitors
Lockdown vs Pre-COVID
Sydney | April vs Feb 2020

THEN: April 2020

Peak COVID-19 isolation
impacted car dealership
visitation from every part of
Sydney

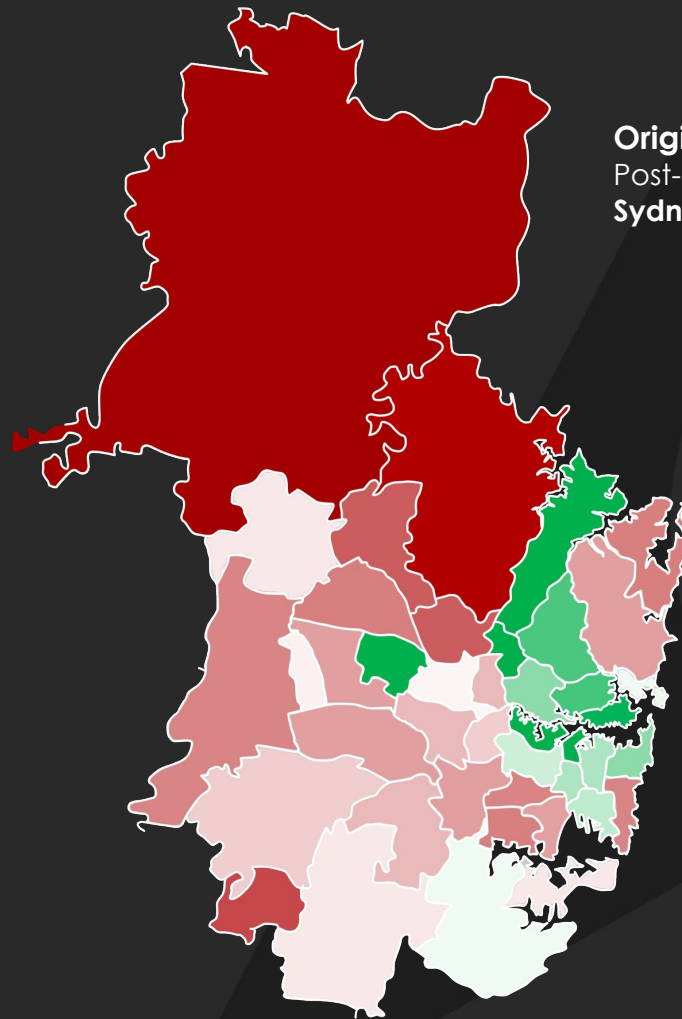


'Recovery' is occurring at *different* speeds

Origin of Car Dealership visitors Post-Lockdown vs Pre-COVID Sydney | May vs Feb 2020

NOW: May 2020

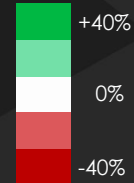
Shoots of recovery as affluent
postcodes lead post-COVID
growth.



Growth Areas

- Blacktown
- Leichhardt
- Canada Bay
- Epping
- North Sydney
- Chatswood
- East Suburbs (North)
- Hornsby
- Strathfield

Change

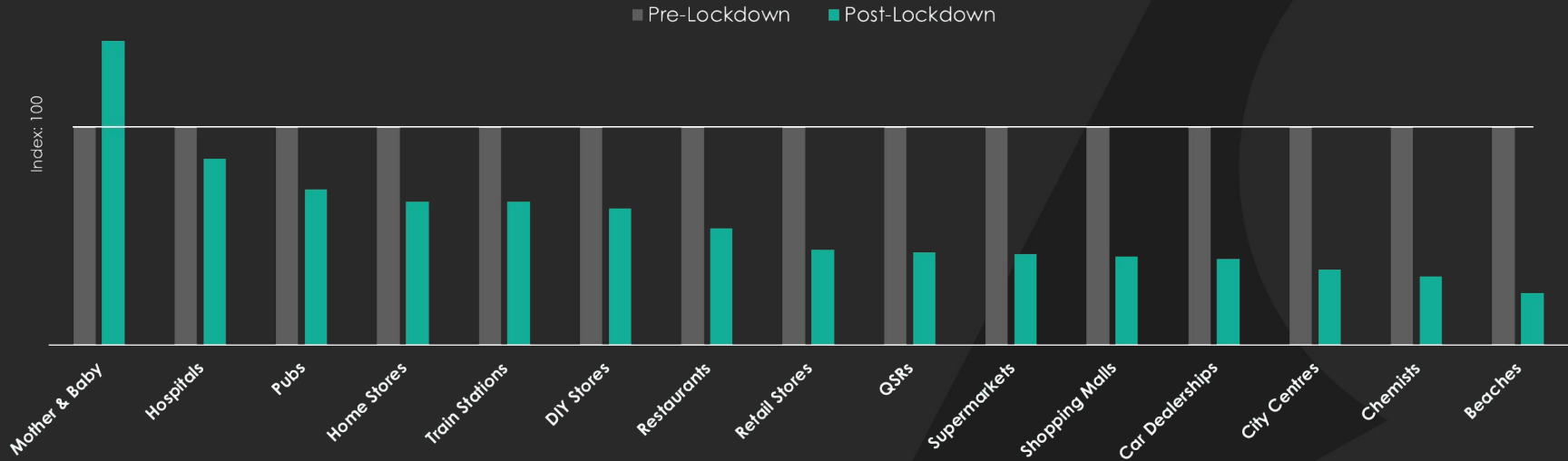


Behaviours are changing:

Australians more **purposeful and brief** in their public interactions

As attention span declines, messaging need to be more direct, impactful and succinct

'Dwell Time' Activity per Device by Location | Indexed vs Pre-Lockdown

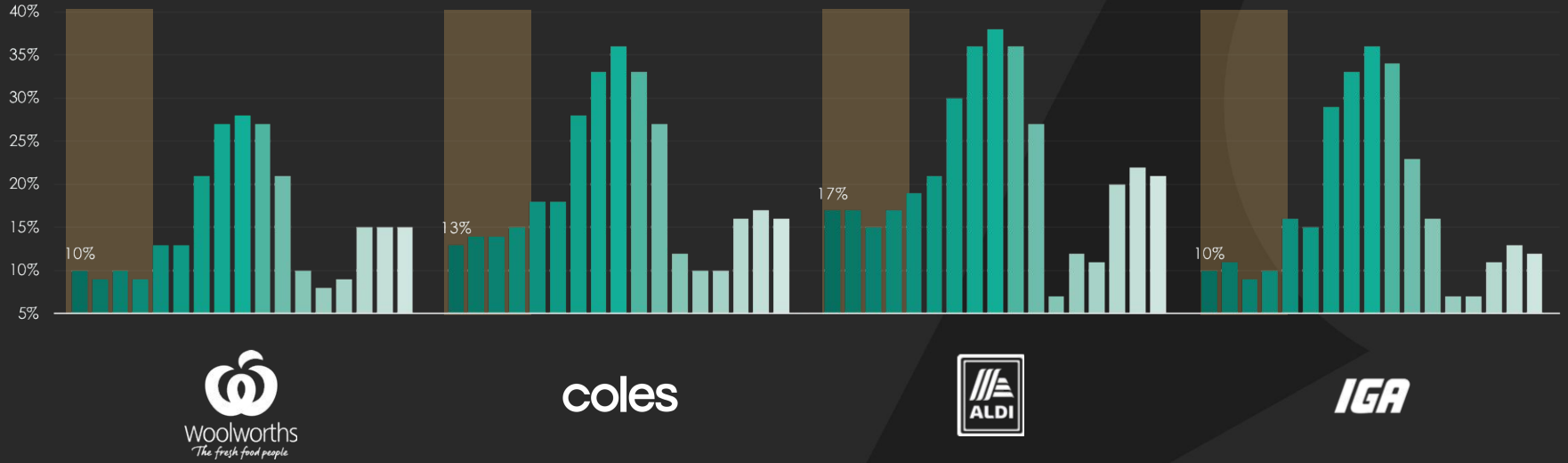


Brand choices are evolving

Pre-COVID 'Normality' Loyalty was consistently strong across all major grocers

Set routines and favoured stores

% Promiscuity | Supermarkets

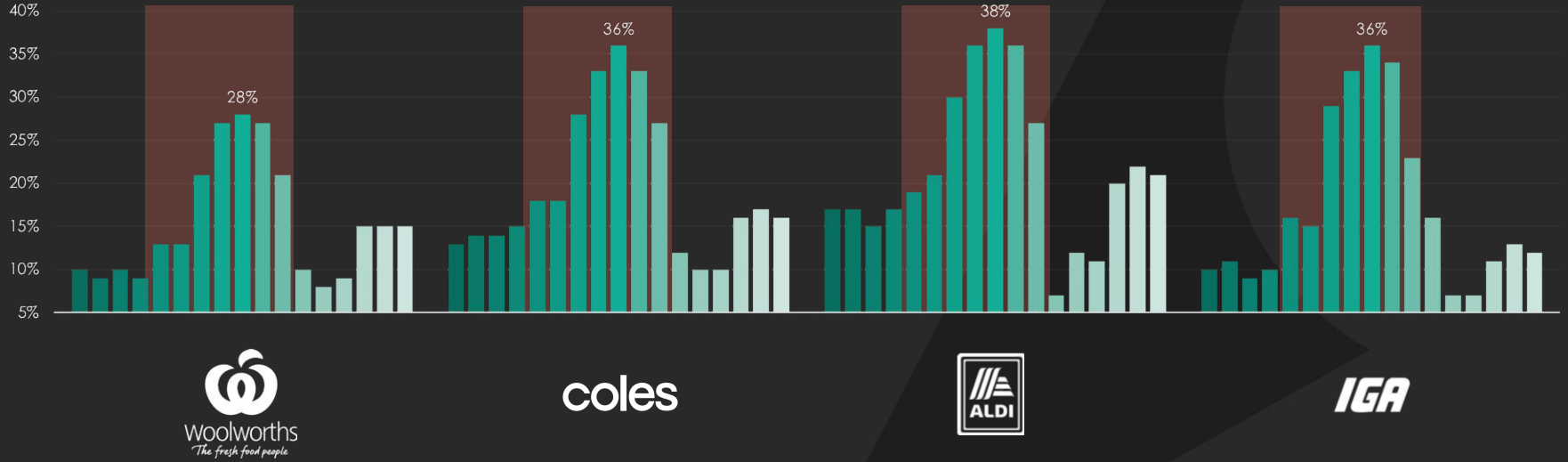


Brand choices are evolving

Pre-Lockdown Panic Shortages, panic buying forced consumers to be more 'disloyal'

Travelling to previously untried stores/brands

% Promiscuity | Supermarkets

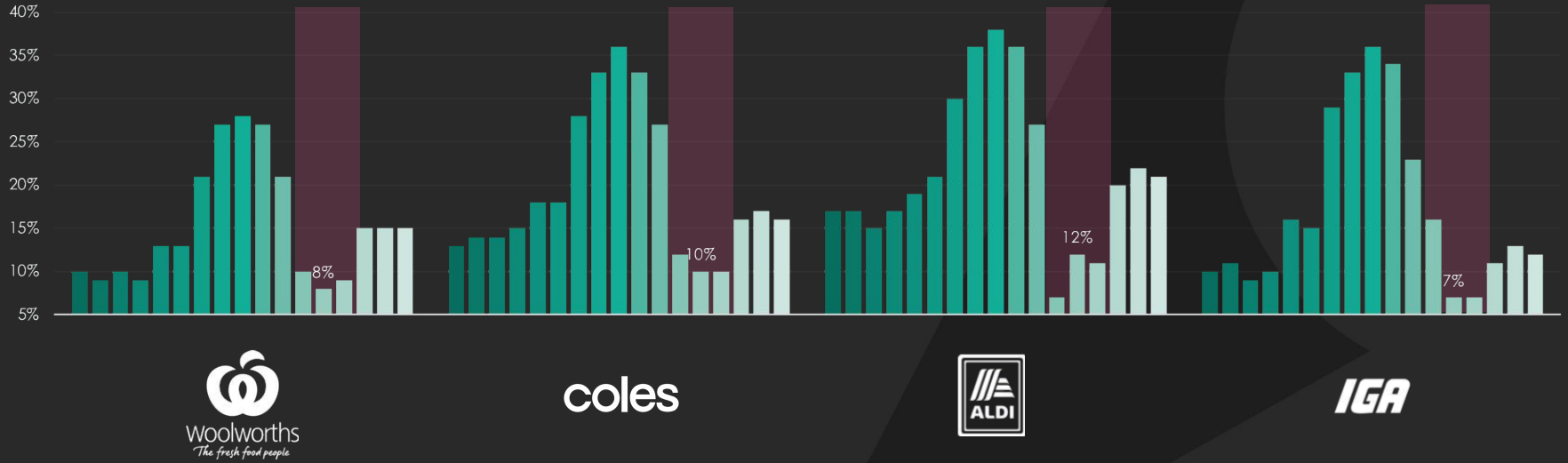


Brand choices are evolving

Lockdown Loyalty spikes as consumers shop local

With movement severely limited, shoppers turned local

% Promiscuity | Supermarkets

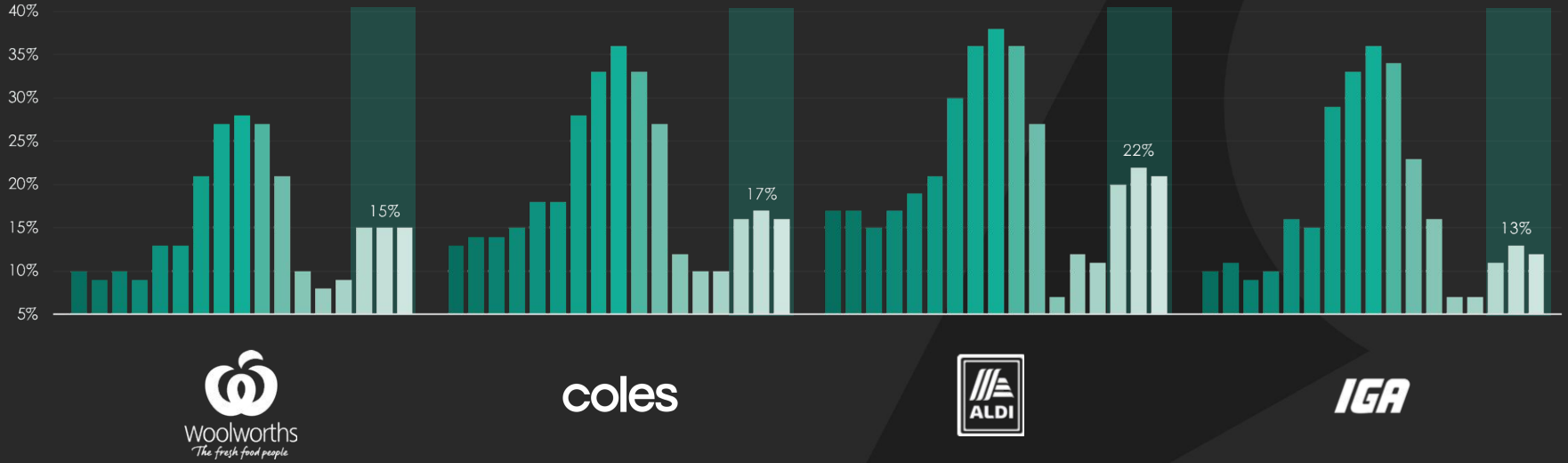


Brand choices are evolving

The new normal? Has the COVID-19 experience conditioned a less loyal shopper?

As restrictions ease, shoppers have not resumed old behaviours

% Promiscuity | Supermarkets



Brand choices are evolving

The new normal? Has the COVID-19 experience conditioned a less loyal shopper?



-10% pts

Ave decline in loyalty vs
Pre-COVID QSRs



-5% pts

Ave decline in loyalty vs
Pre-COVID Department Stores

What now? Thought Starters for DOOH

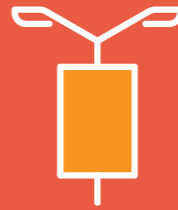
A different message for an evolving mindset

Go where the action is

Get to the point

Capitalise on the “new consumer openness”

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Q&A



THURSDAY 11 JUNE
11 AM - 12 PM

MEDIA & COMMERCE BEHAVIOUR TRENDS

TEMPORARY VS PERMANENT CHANGES

