Journey to 10%

Programmatic DOOH

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Hello IAB and OMA

24 Years
OOH
LONDON / MOSCOW /
SHANGHAI / TOKYO
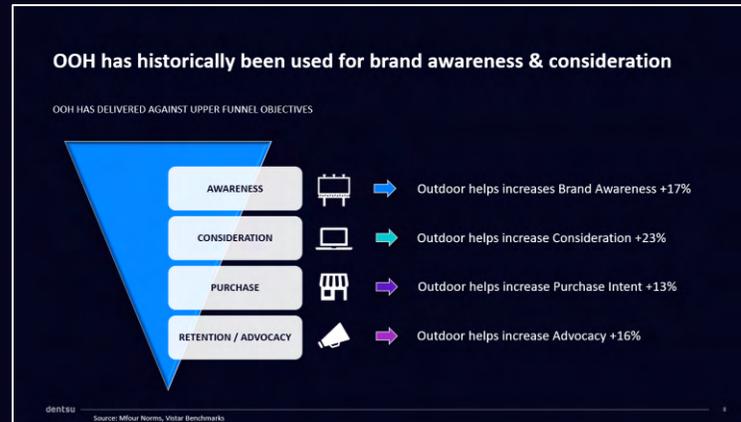
2 Years
Global
OOH Lead

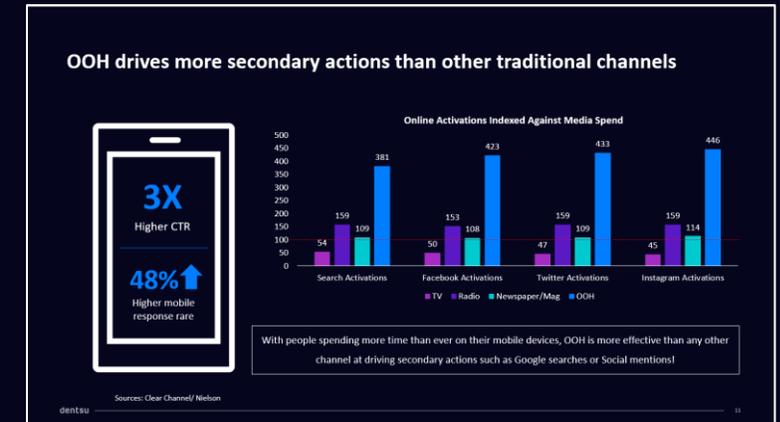# Out-of-Home has never been so relevant and important

Reach Maximiser

Brand Builder

Action Driver

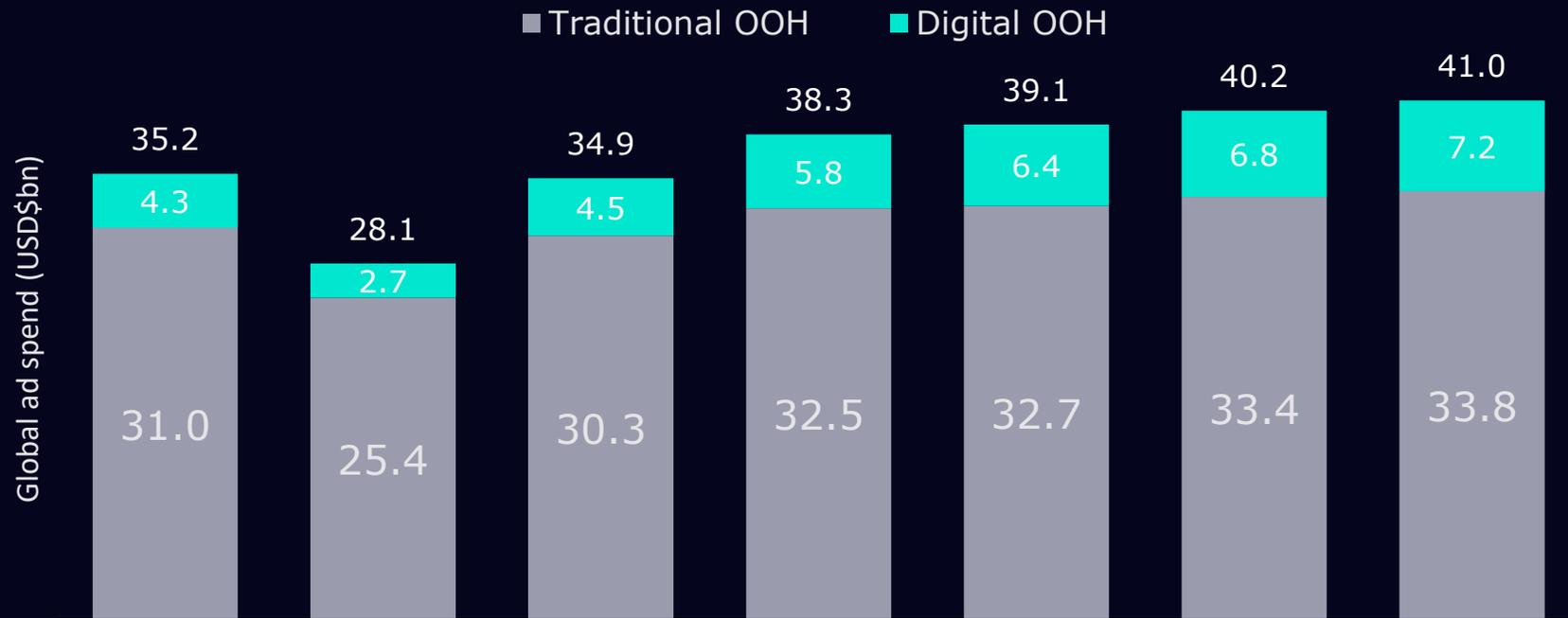## Trusted medium

A Force for Good

Creative Canvas[10]

Whilst the outlook for OOH is strong, sector share growth remains the biggest challenge and opportunity

■ Traditional OOH ■ Digital OOH

Global ad spend (USD$bn)

|	2019	2020	2021	2022f	2023f	2024f	2025f
Total	35.2	28.1	34.9	38.3	39.1	40.2	41.0
Digital OOH	4.3	2.7	4.5	5.8	6.4	6.8	7.2
Traditional OOH	31.0	25.4	30.3	32.5	32.7	33.4	33.8
Total OOH Spend growth rate (%)	4.2%	-20.1%	24.0%	9.9%	2.0%	2.8%	2.0%
OOH share of total media (%)	6%	5%					

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Addressable buying continues to grow

GLOBAL MEDIA

- $703bn Media SPEND
- $401bn DIGITAL SPEND (57%)
- $280bn Traded Programmatically (70%)

GLOBAL OOH

IT'S HAPPY HOUR IN DOWNTOWN BROOKLYN. WHAT A TIME TO BE ALIVE.
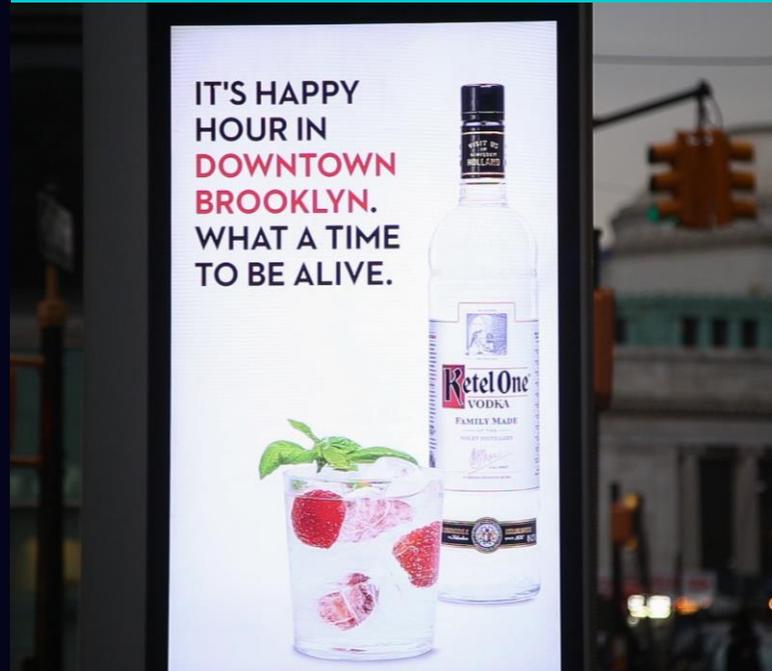
- $38bn SPEND
- $15bn DIGITAL SPEND (39%)
- $885m Traded Programmatically (2.3%)
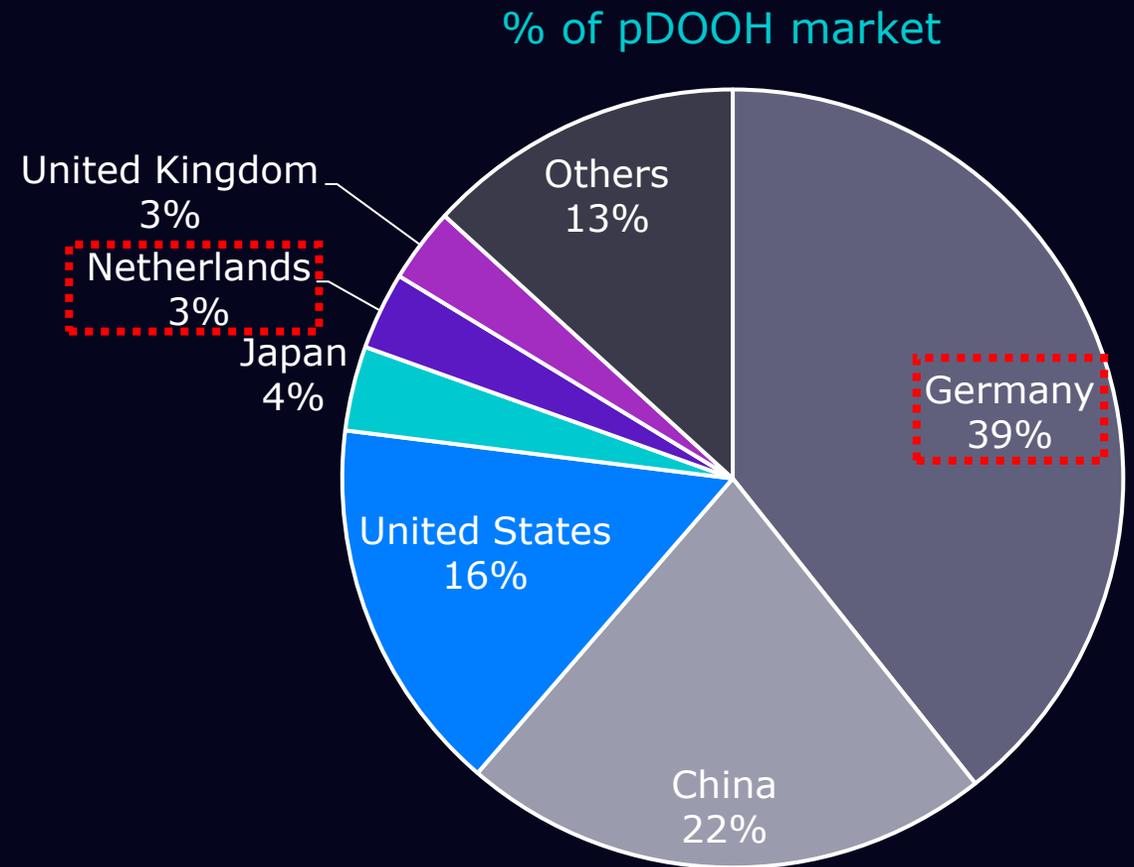
GLOBAL DOOH

- $15bn SPEND
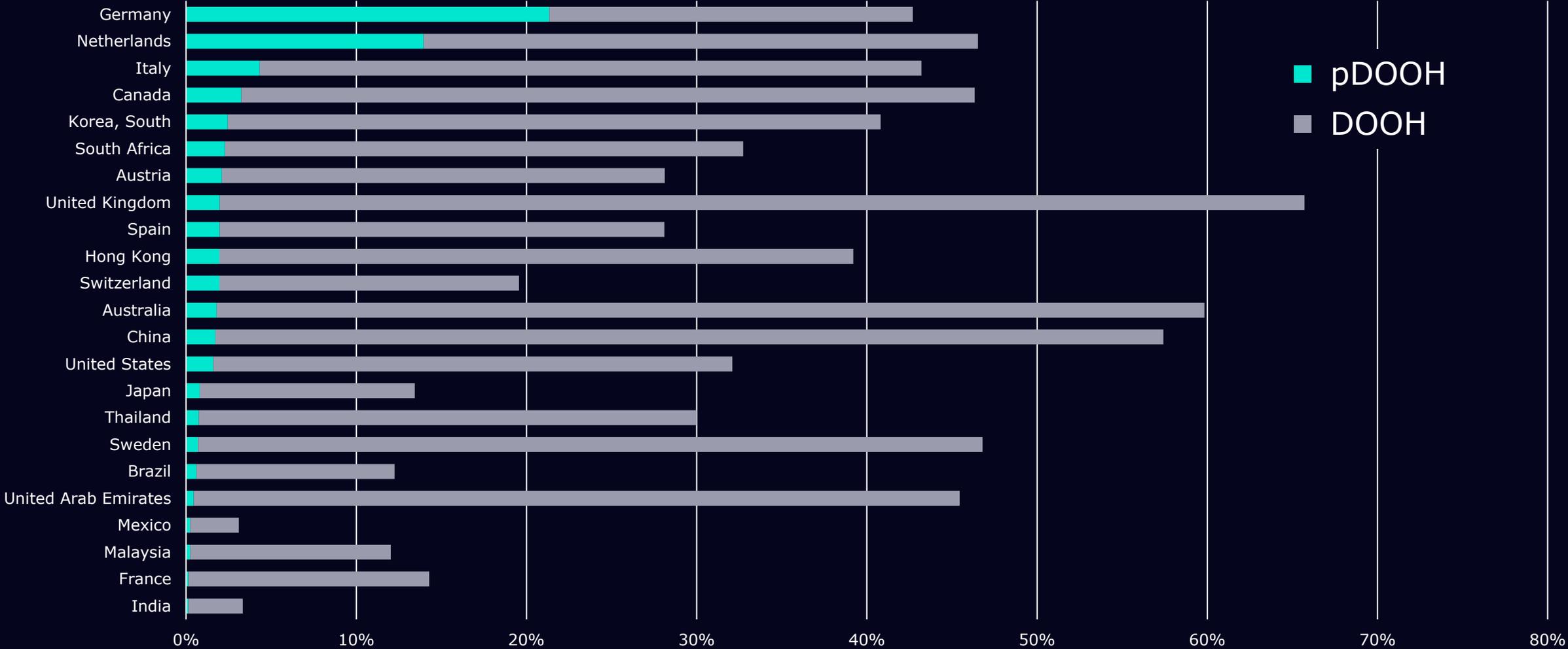- $15bn DIGITAL SPEND (100%)
- $885m Traded Programmatically (5.9%)

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pDOOH spend primarily driven by overall market scale. Germany and Netherlands overindexing significantly

Top 6 markets = 80% of global OOH spend

Market	2022 OOH spend	2022 DOOH %
China	$12bn	57.4%
United States	$9.1bn	32.1%
Japan	$4.1bn	13.4%
Germany	$1.7bn	42.7%
UK	$1.5bn	65.7%
France	$1.4bn	14.3%
South Korea	$681m	40.8%
Australia	$667m	59.8%
Russia	$600m	47.6%
Next 15	$4.7bn	30.7%

% of pDOOH market

- Germany 39%
- China 22%
- United States 16%
- Others 13%
- Japan 4%
- United Kingdom 3%
- Netherlands 3%

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2022 DOOH & pDOOH % of total OOH market

Legend: pDOOH, DOOH

Countries (top to bottom): Germany, Netherlands, Italy, Canada, Korea, South, South Africa, Austria, United Kingdom, Spain, Hong Kong, Switzerland, Australia, China, United States, Japan, Thailand, Sweden, Brazil, United Arab Emirates, Mexico, Malaysia, France, India

X-axis: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%
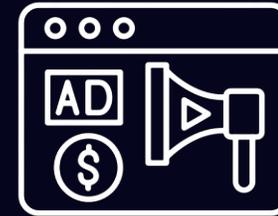
Source: Luma Partners, 2023

There are three ways to trade OOH. Need to enable all 3

Direct

Automation

Programmatic

Slow & Deliberate Progress
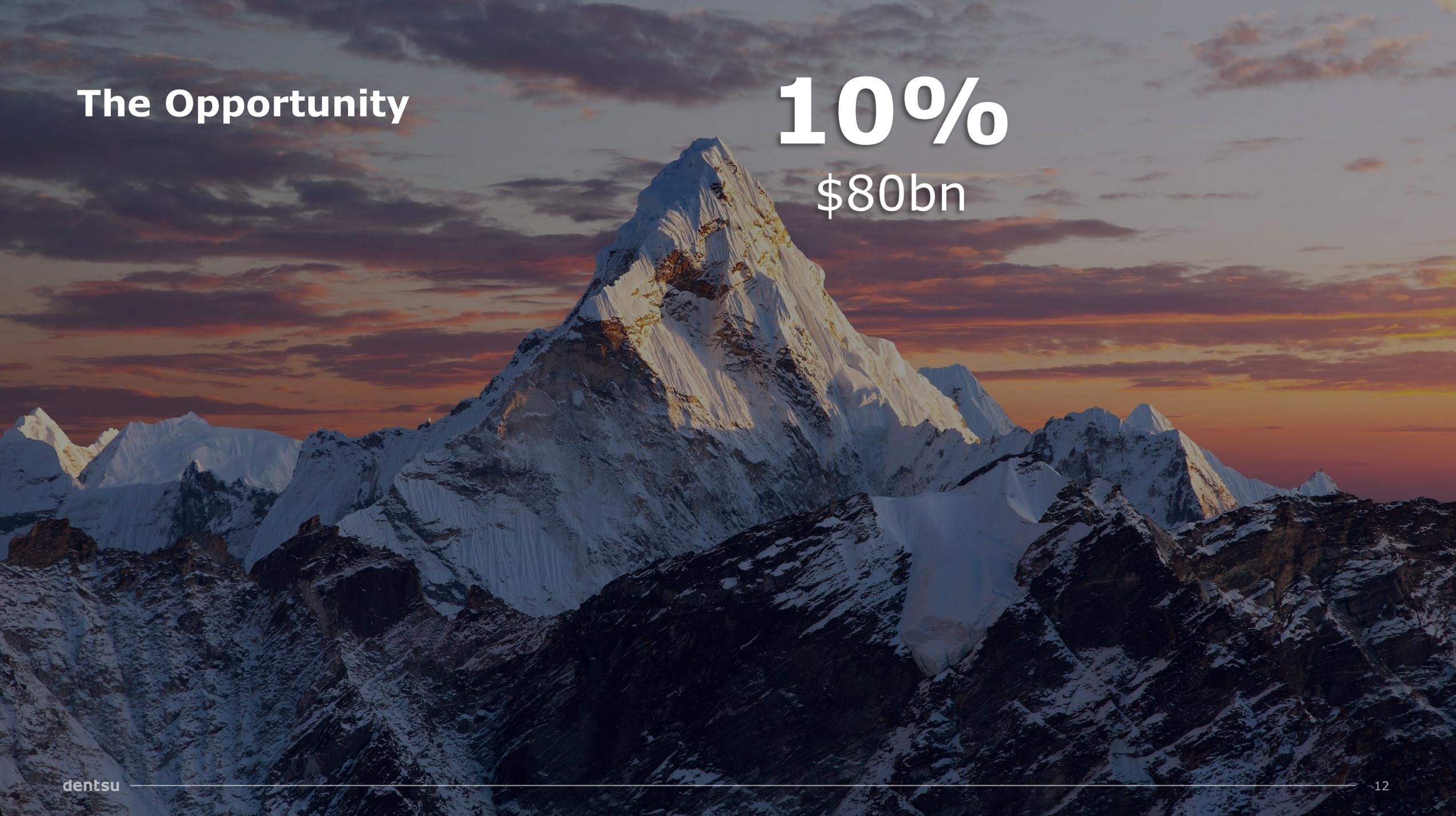
1000
DSP Buyers
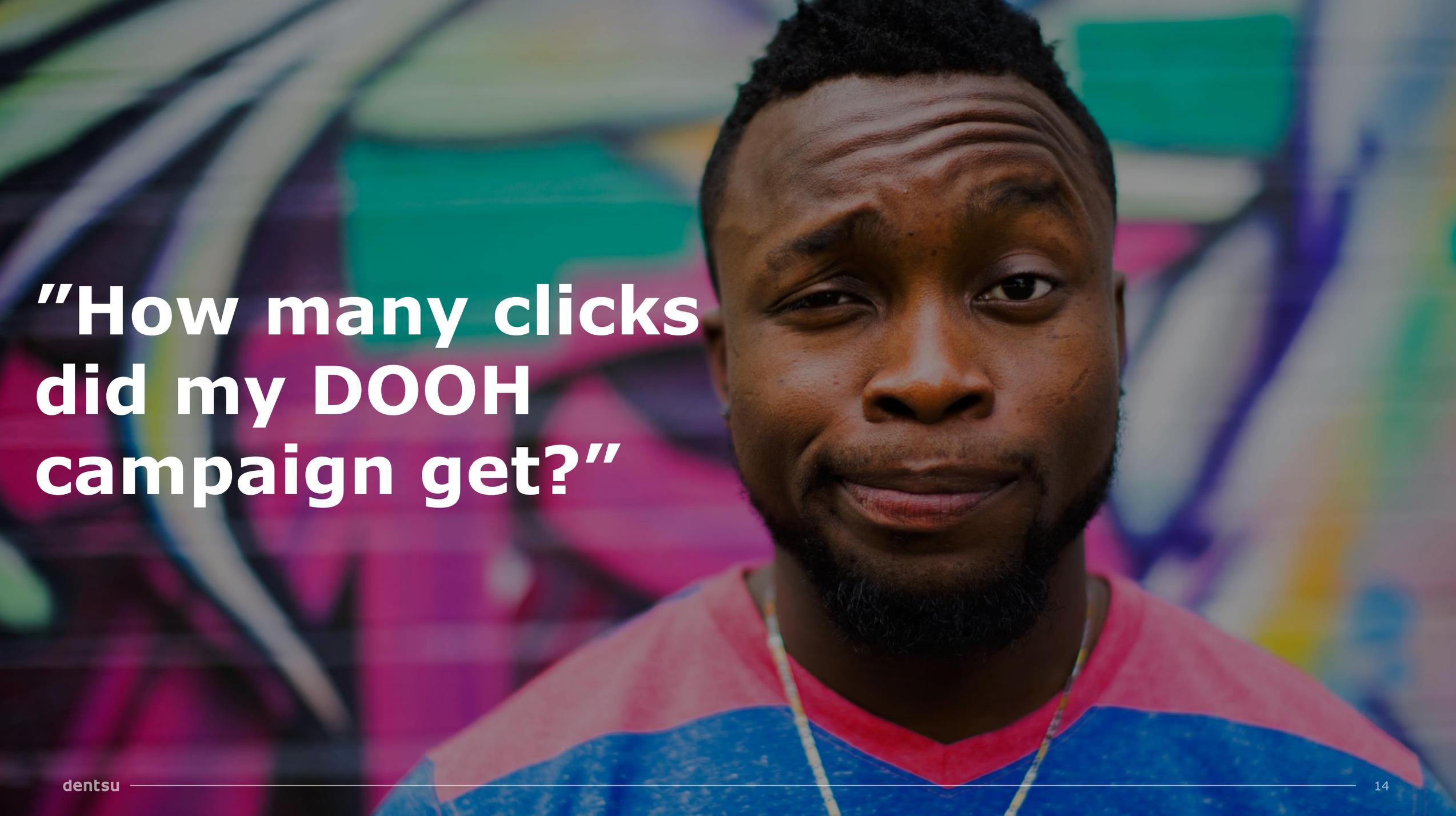
▶

100+
Active Clients

▶

+78%
YOY Spend

The Opportunity

10%
$80bn

#1

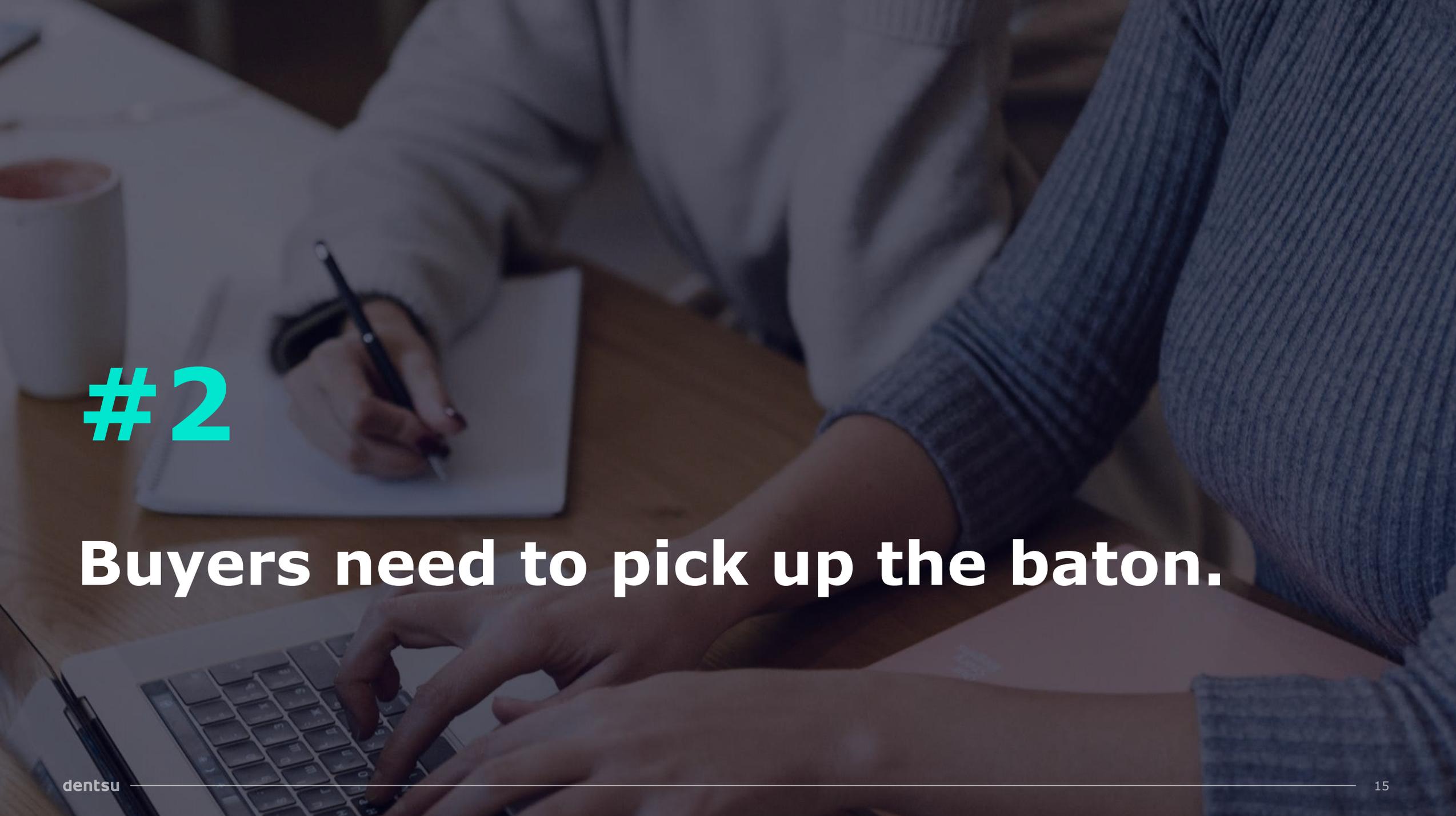## Keep it simple, cut the jargon and acknowledge the limitations

"How many clicks did my DOOH campaign get?"

#2

Buyers need to pick up the baton.

Integrating capabilities and expertise in-house at dentsu

Bringing Addressable and OOH talent together
Fusing OOH Expertise with Programmatic Technology

dentsu
OOH

dentsu
programmatic

+
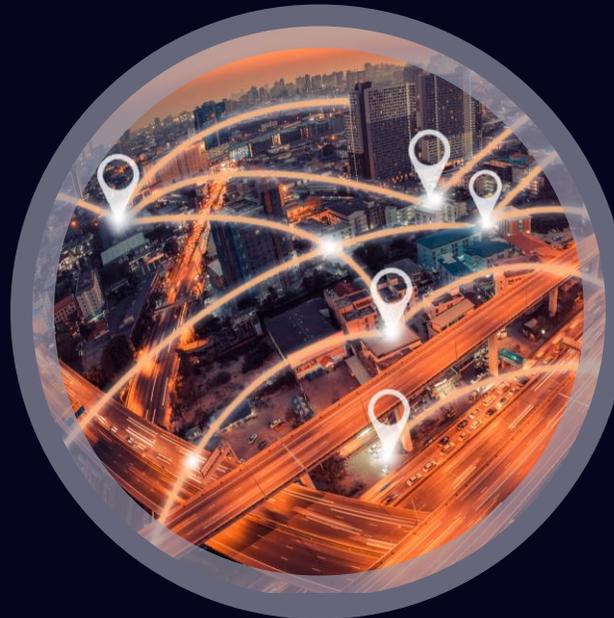
#3

Find a seat at the table.

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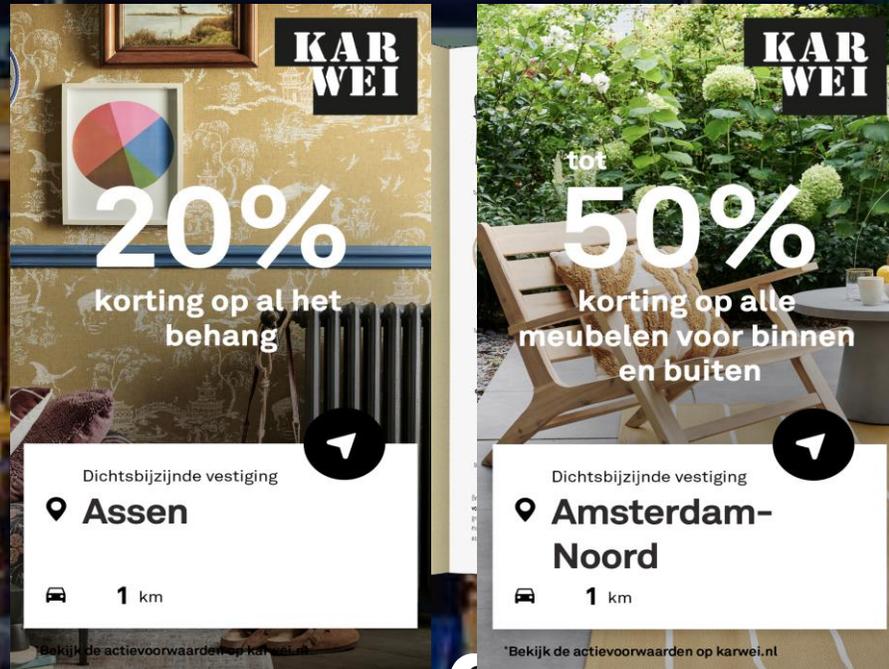**IDENTITY**   **ATTENTION**   **CONTEXT**

AUDIENCE   **LOCATION**   **PHYSICAL CONTEXT**

Karwei (Netherlands)

Door drops
pDOOH

RESULT
Lift in store visitation
10x budget into OOH

Tommy Hilfiger – Western Europe

Core locations

pDOOH

Defined role and budget for pDOOH

Targeting tightly defined social audiences outside core locations

Retargeting visitors to competitors

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#4

Consistency is key to growth.

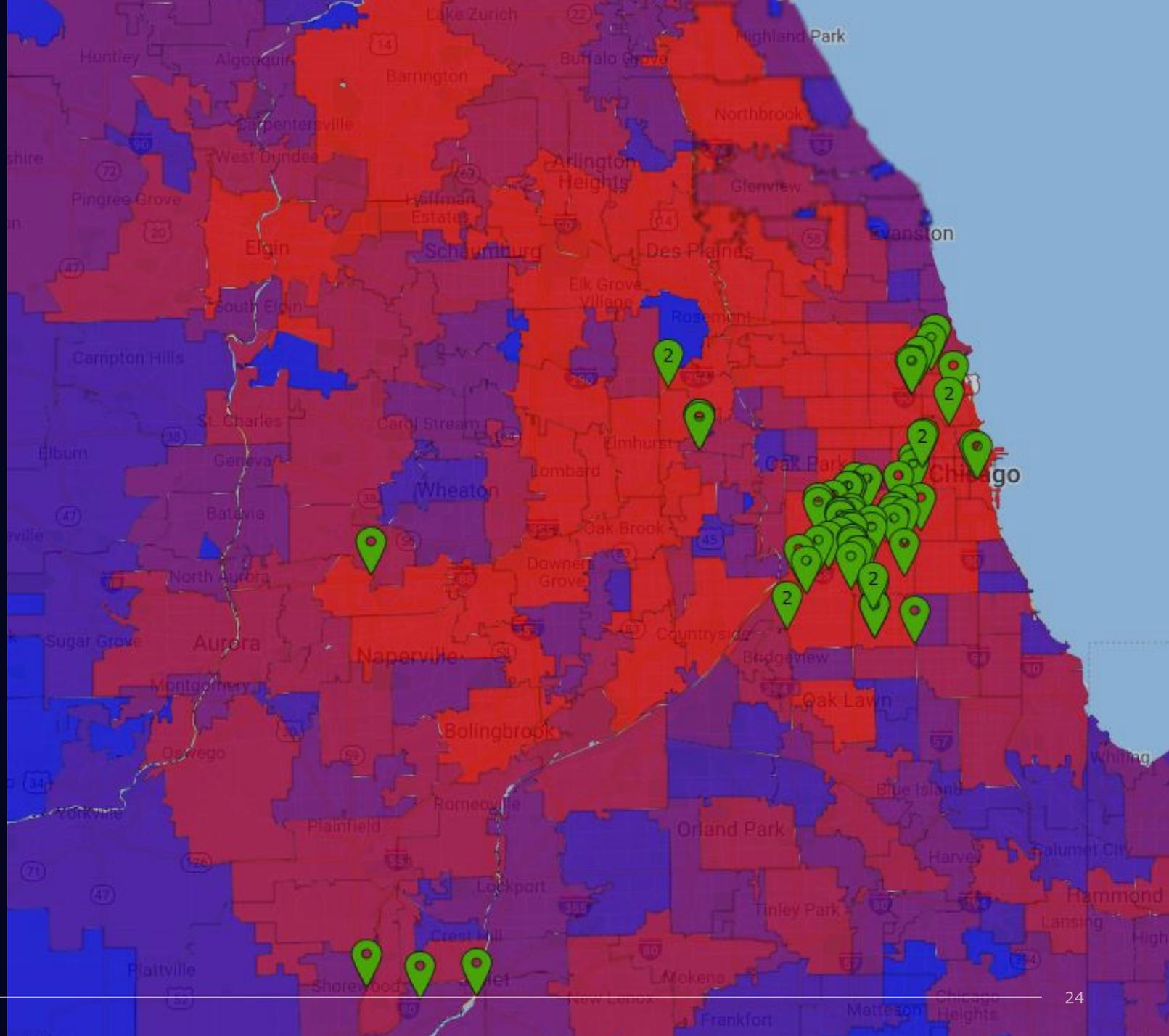PRECISION   SPEED   AGILITY

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Precision

M + **MERKURY**

1. **1:1**

2. **1st Party Audiences**

3. **Omni-channel Activation**

4. **Smarter Targeting**

   - **Location**
   - **Time**
   - **Context**

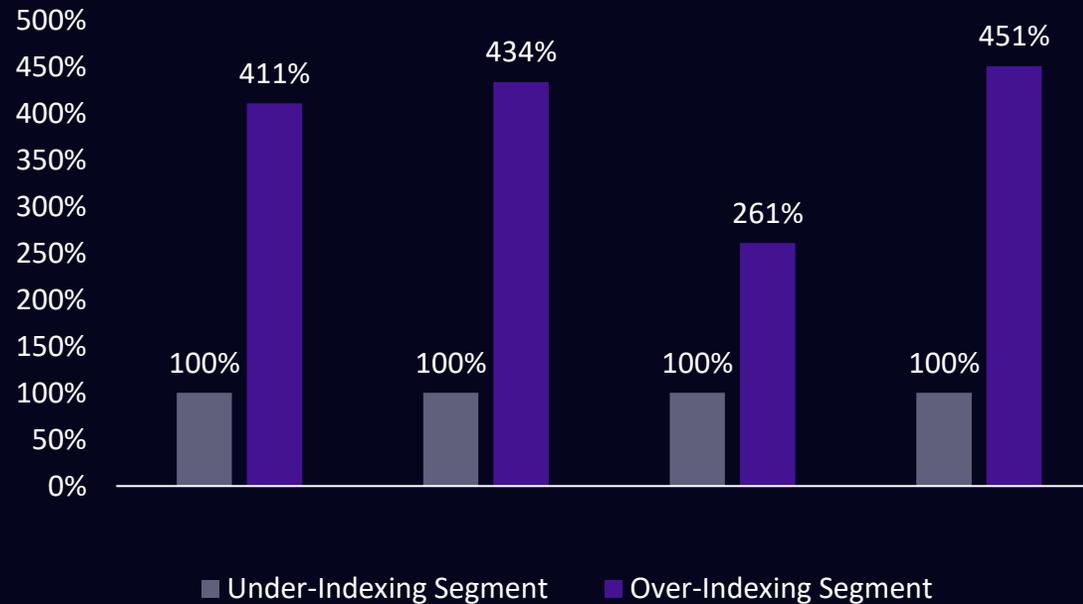# CASE STUDY: M1 targeting increased web visitation for RE/MAX

OBJECTIVE

/ Confirm the applicability and effectiveness of targeting M1 segments in the OOH channel. In particular, demonstrate that screens over-indexing on reach for target M1 segments for a given advertiser deliver significantly better performance than screens that under-index on those target segments.

EXECUTION

/ The media was programmatically purchased using targeting parameters to only activate in zip codes where OOH of a specific M1 audience over-indexed.
For purpose of this test, in the first two weekends, media ran in zip codes that over-indexed for the M1 audience and under-indexed for the M1 audience.

Indexed Segment Response

411%
434%
261%
451%
100% 100% 100% 100%

■ Under-Indexing Segment   ■ Over-Indexing Segment

2.5x

lift for Home Page visitation

4.3x

lift for Property Search Page visitation

SOLD FOR SALE
RE/MAX
REMAX.COM

DON'T WORRY, WE'VE DONE THIS A MILLION TIMES.
SOLD FOR SALE RE/MAX
REMAX.COM

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Speed

1. **Real-time Decision Making**

2. **Business Outcomes**

3. **Market Conditions**

4. **No Booking Deadlines**

5. **Artwork Lead Times**

Agility

1. Moments Targeting

2. Flexible Delivery

3. Pay per Play

4. Real-time Optimization

5. Dynamic / Contextual Messaging

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#5

Define and measure success.

"**Stop creating a false distinction between Performance Marketing and Brand Marketing. It all performs. Some of it just requires different measurement techniques and happens over different time horizons. The most important thing is that you define success and measure it.**"

OOH contributes across the purchase funnel

BRAND LIFT:
RECALL
PERCEPTIONS
INTENT

DRIVE TO:
SEARCH
SOCIAL
WEBSITE
STORE

PURCHASE:
PHYSICAL
ONLINE
NEW/REPEAT

AWARENESS

CONSIDERATION

CONVERSION

Case Study: Dealership Visitation
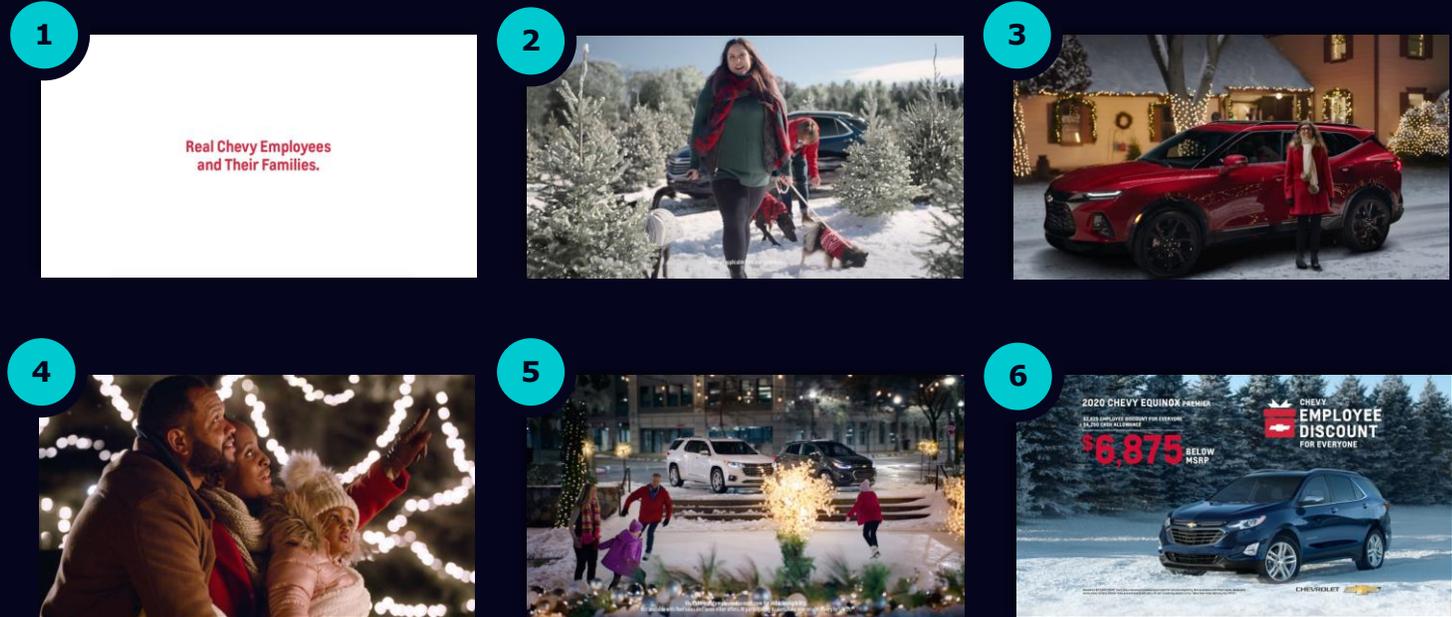
GSTV | CHEVROLET
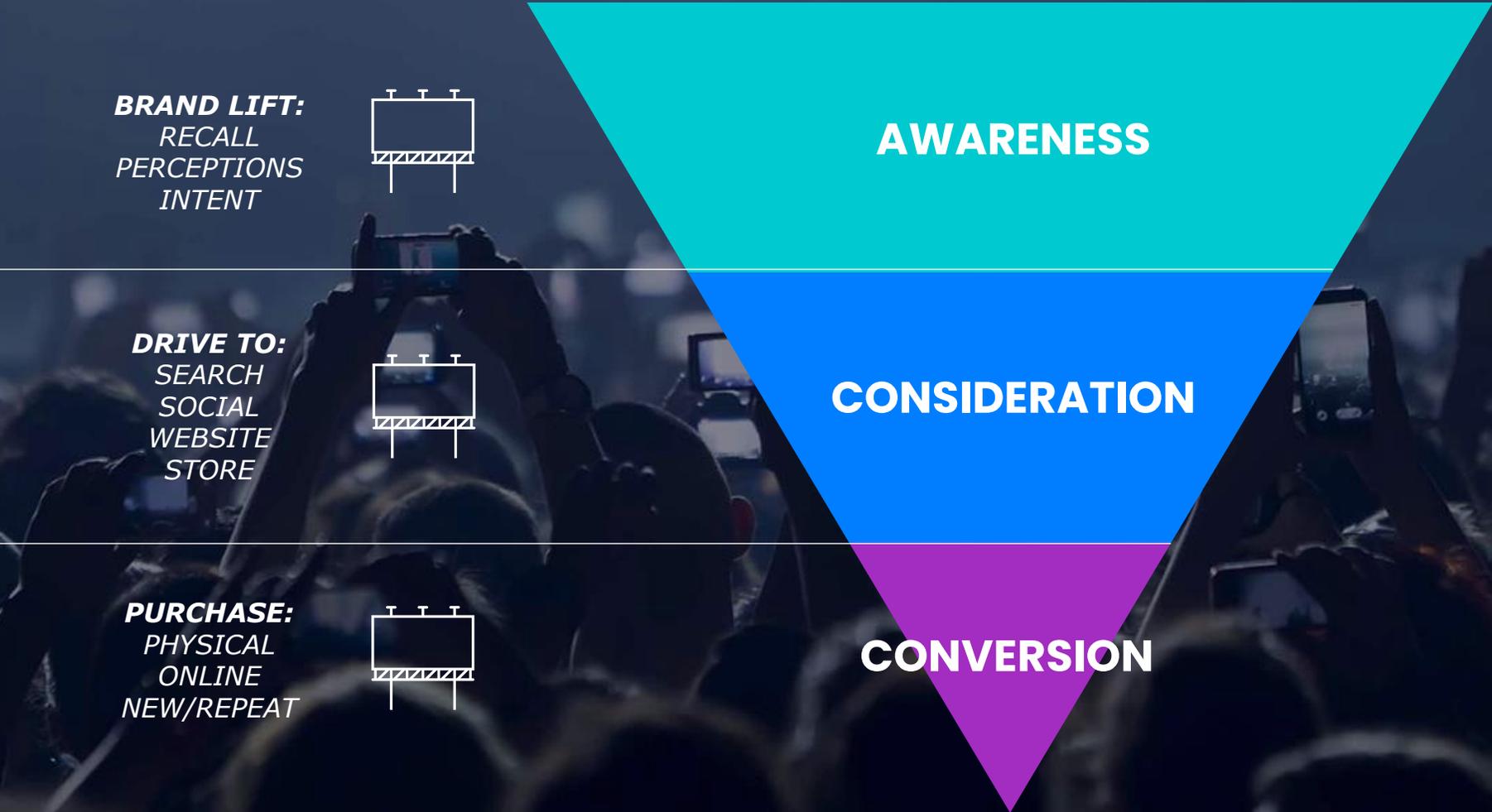
Objectives:

To understand if Programmatic DOOH drives incremental uplift to dealerships for the Employee Discount campaign

To determine if GSTV locations that index highly against the M1 audience drive more traffic than standard locations

Approach:

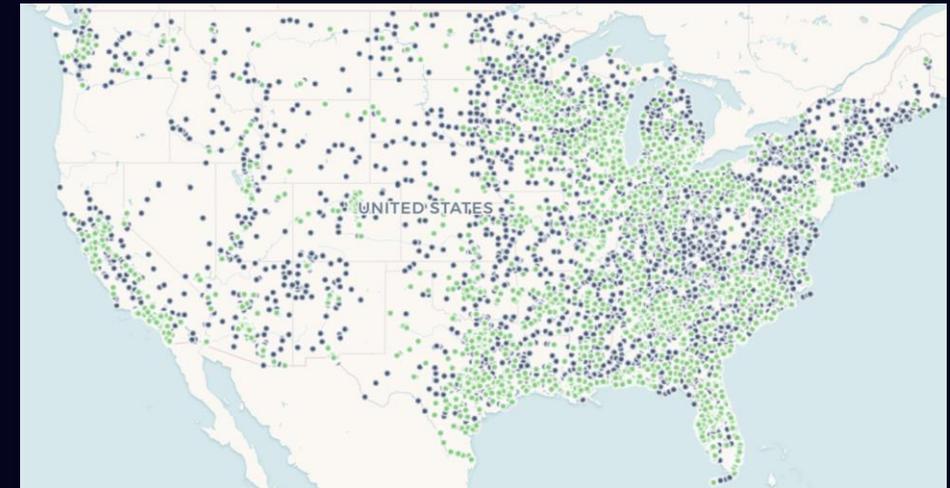Activated DOOH media across the GSTV network

Case Study: Dealership Visitation

FOURSQUARE

	TOTAL CAMPAIGN	M1 DATA OPTIMIZED	NON-DATA OPTIMIZED
BEHAVIORAL LIFT	+6.30%	+11.01%	+4.38%
DEALER CONVERSION RATE	6.68%	7.09%	6.52%
INCREMENTAL VISIT INDEX	100	178	70

M1 GSTV SITE
6,322 STATIONS
36.3MM IMPS

NON-M1 GSTV SITE
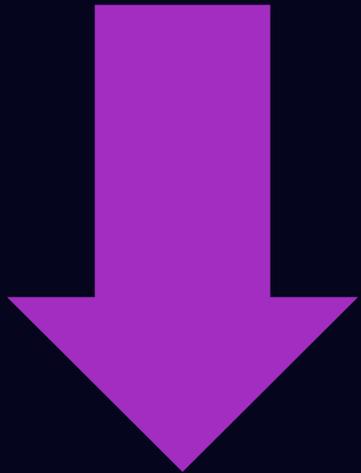13,048 STATIONS
91MM IMPS

#6

Remember, it is still

Out of Home.

Caretaking the medium
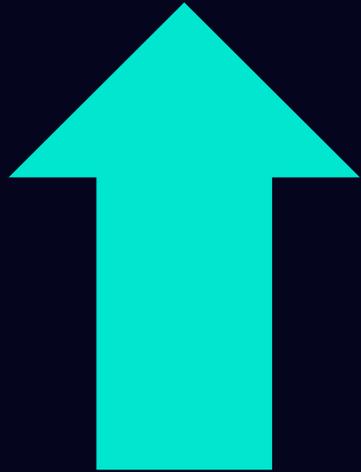
POSITIVE

- New buyers, brands and spend into the OOH channel

- Repeat advertising – it's obviously working

NEGATIVE

- Brands care about the brands they are seen with

- Poor creative devalues the consumer experience

- Long term negative impact on attention to OOH

Journey to the 10%

1. **Keep it simple, cut the jargon**

2. **Buyers need to pick up the baton**

3. **Find a seat at the table**

4. **Consistency is key to growth**

5. **Define and measure success**

6. **Remember, Programmatic DOOH is still OOH**

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Are all impressions equal?

What is the environmental impact?

What's next?