

welcome

to

powering

iab
australia

OMA

DOOH

new research: attitudes to programmatic research wave 3



natalie stanbury
research director
iab australia



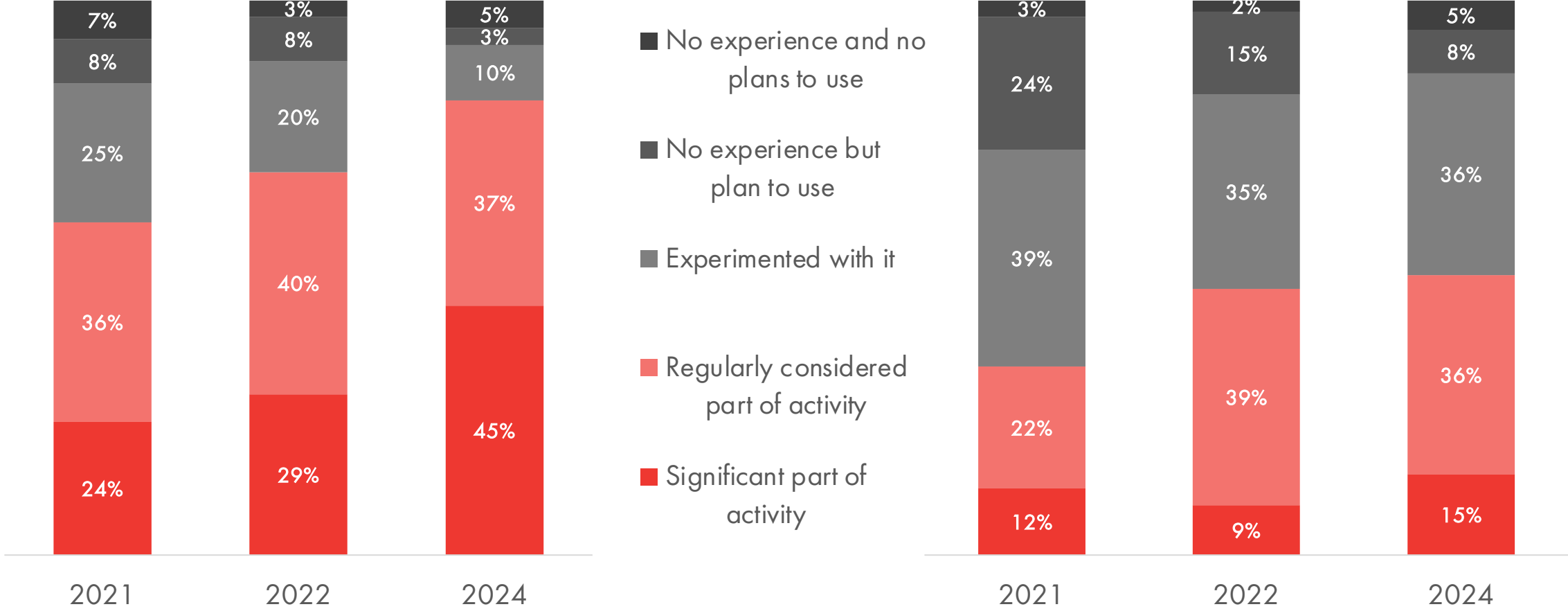
sabarish chirakkal
director - programmatic
val morgan outdoor

attitudes to programmatic DOOH

experience with DOOH advertising amongst agencies.

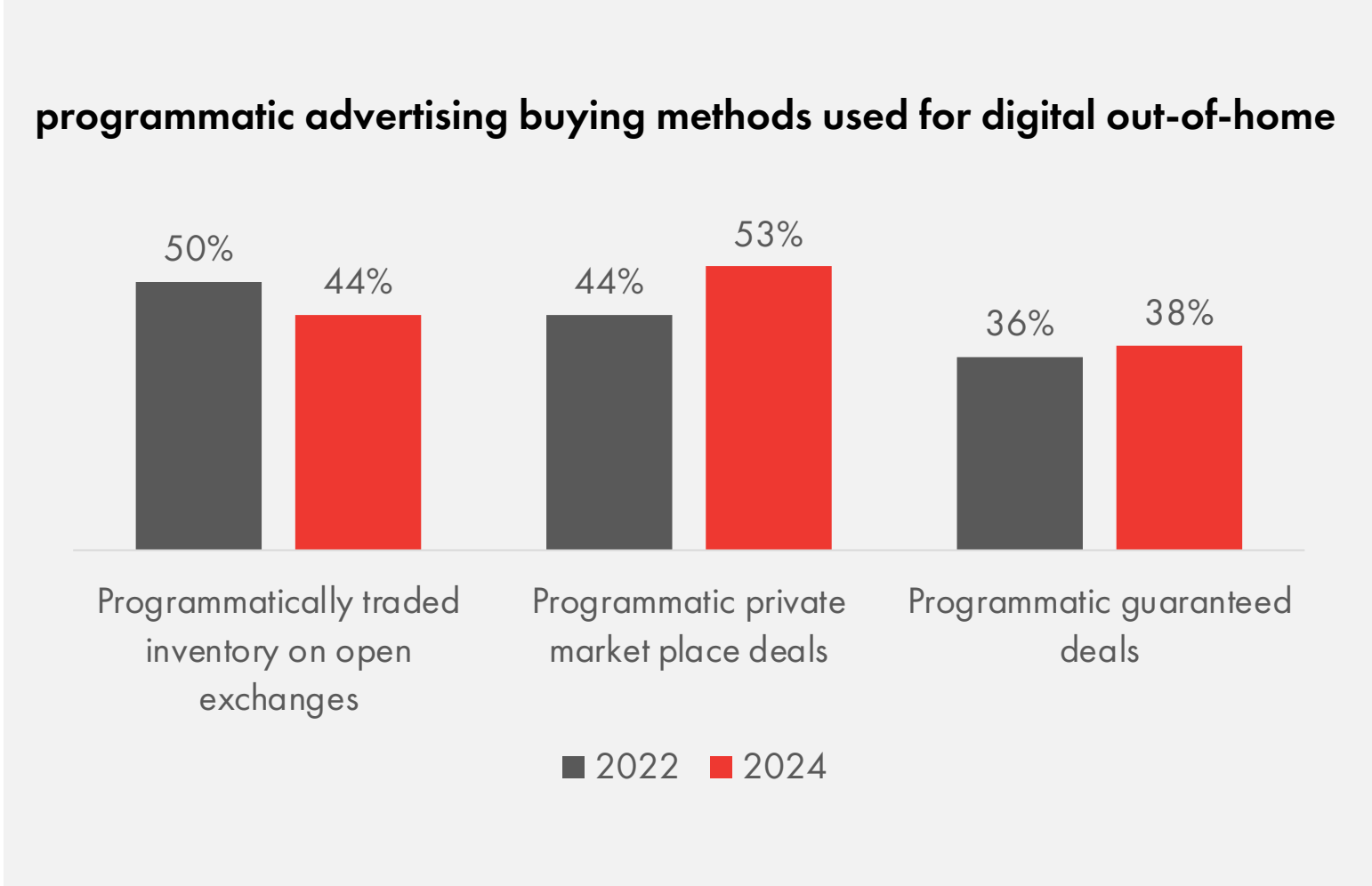
buying via IO/direct

buying programmatic



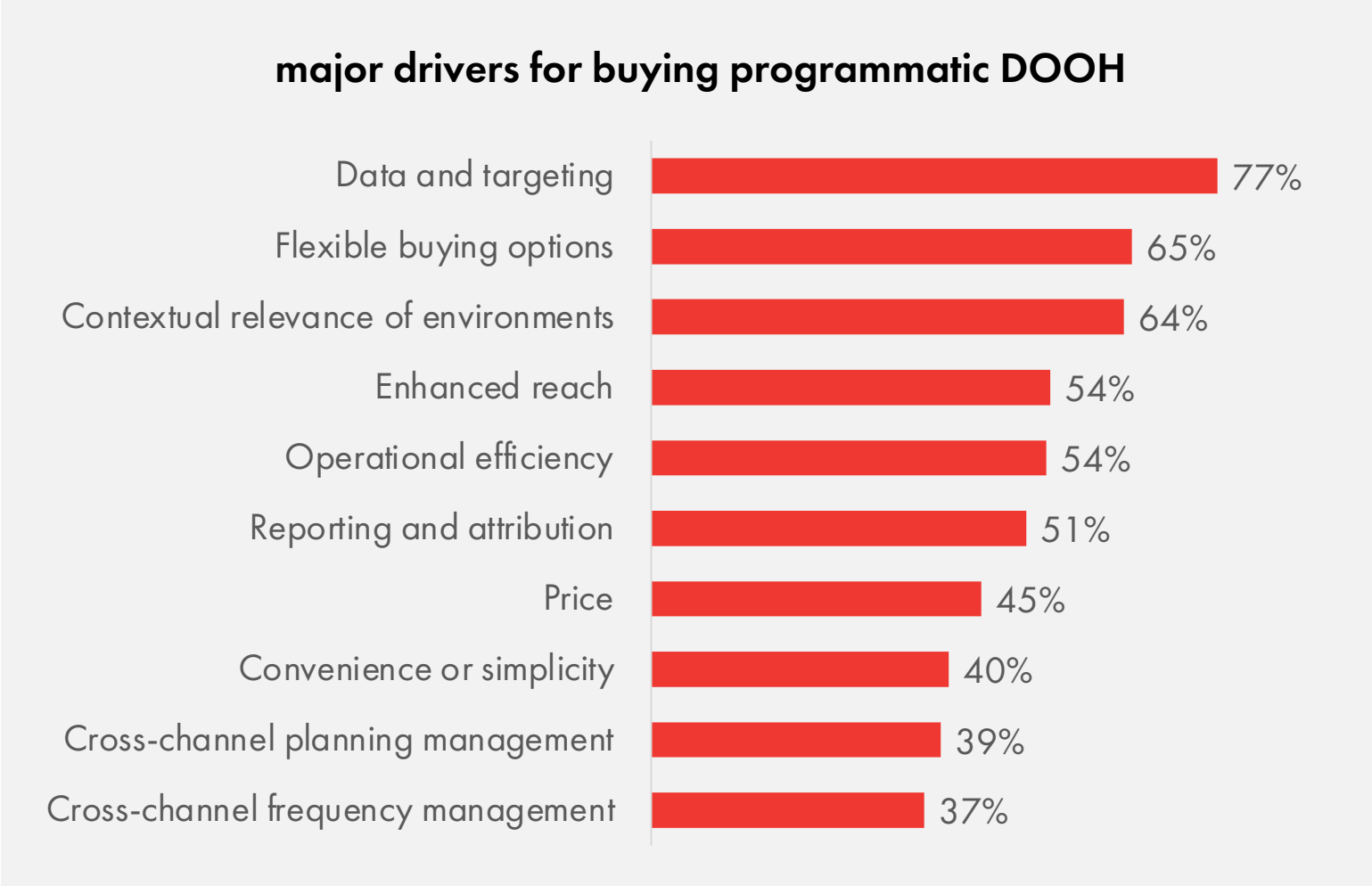
programmatic buying methods for DOOH advertising.

agencies and brands are using a combination of programmatic buying methods for DOOH.



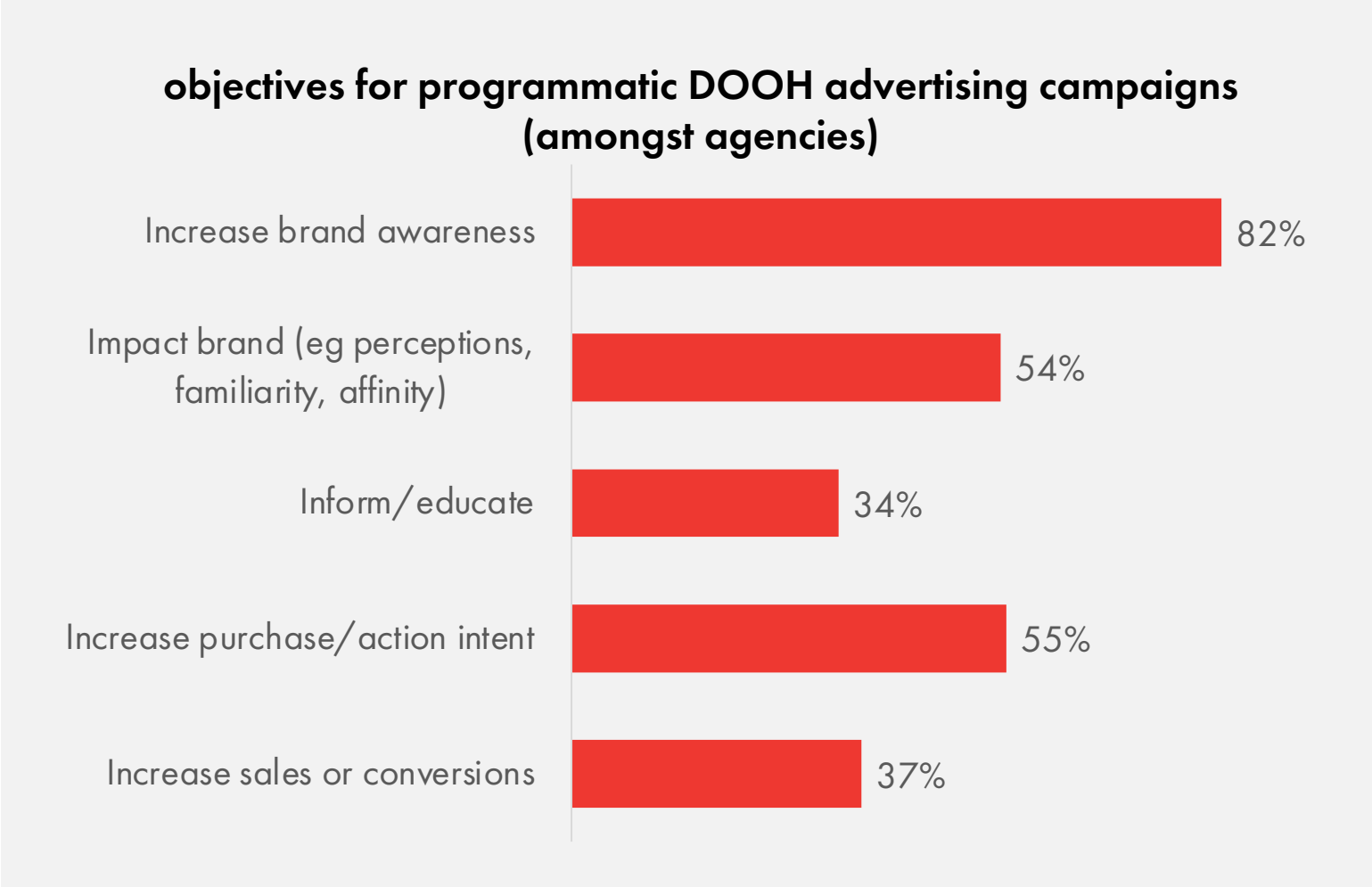
drivers for buying programmatic DOOH.

data and targeting and flexible buying remain important drivers for buying programmatic DOOH.



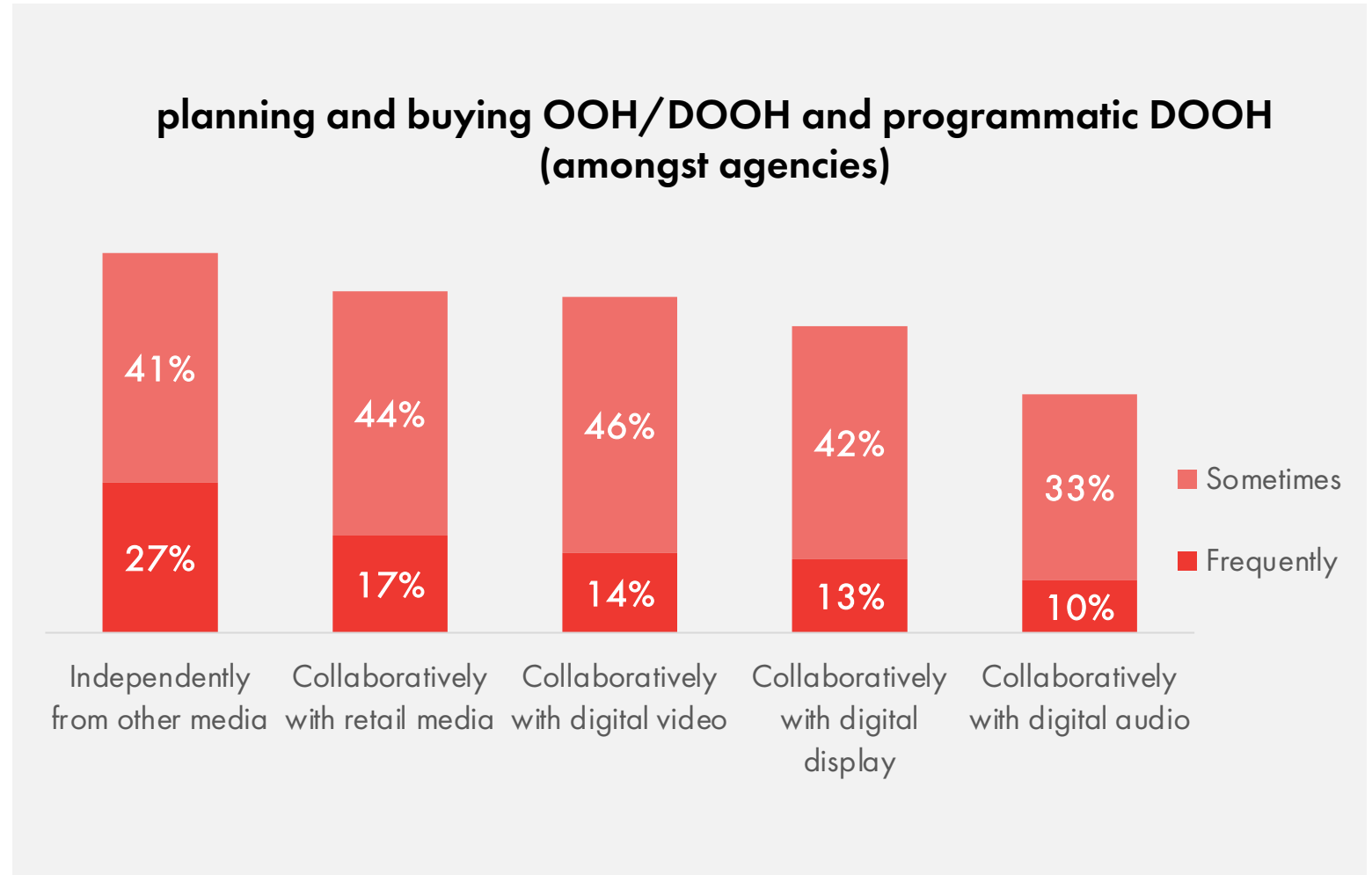
objectives for programmatic DOOH advertising.

agencies set out to achieve multiple campaign objectives, with brand awareness remaining the predominant objective.



planning and buying programmatic DOOH advertising.

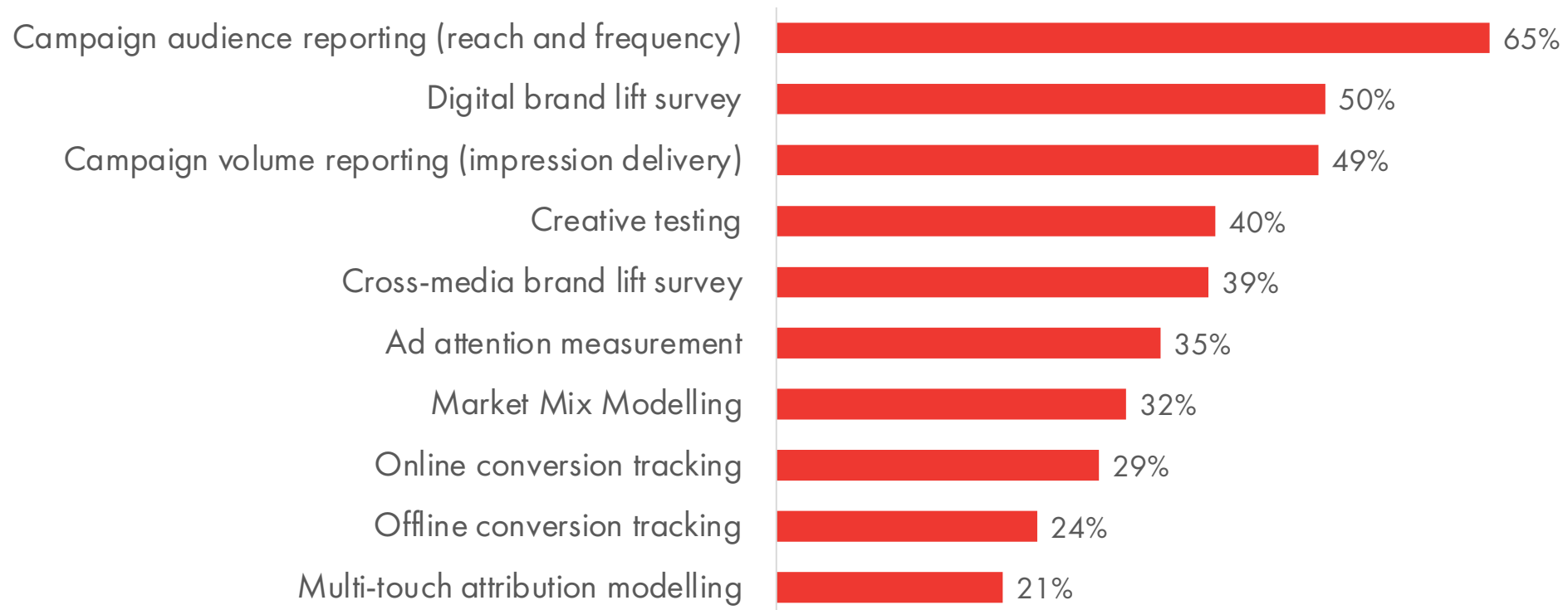
programmatic DOOH is being planned and bought collaboratively with other digital inventory.



important measurement tools to assess ad effectiveness.

campaign audience reporting is rated as the most important measurement tool for assessing effectiveness of OOH and DOOH advertising.

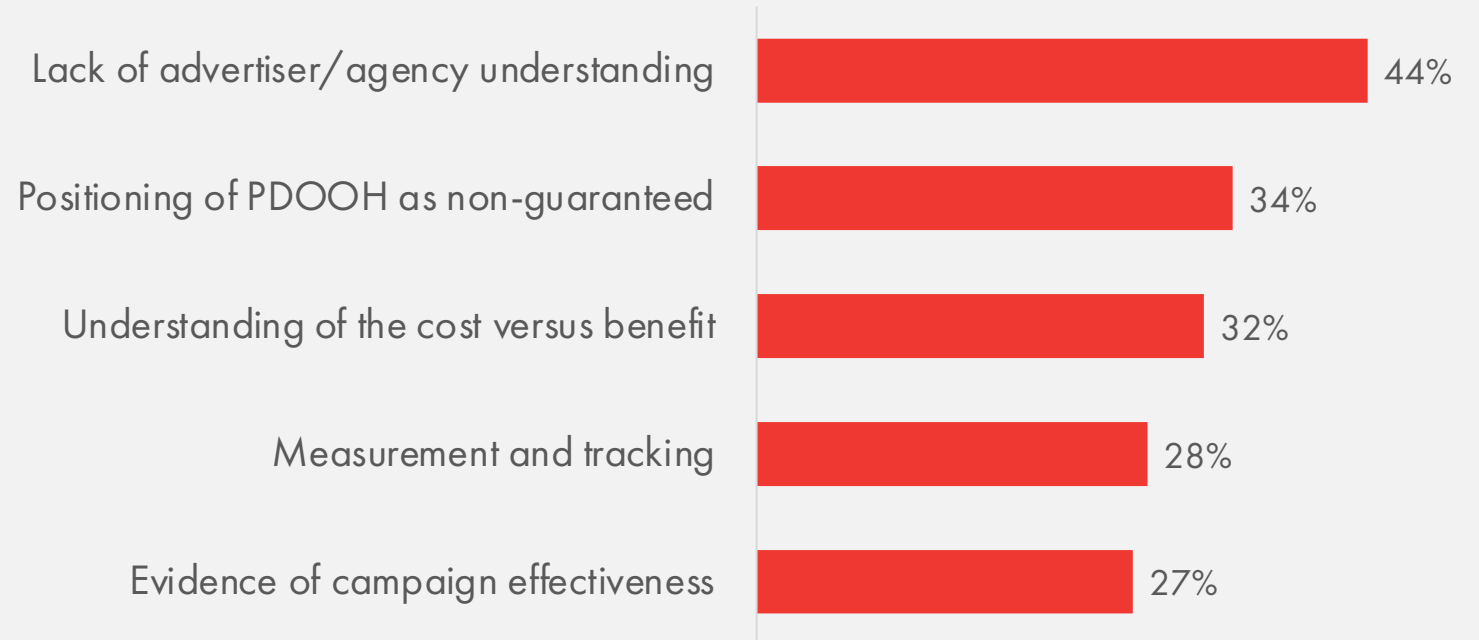
important tools for assessing the effectiveness of OOH and DOOH campaigns (amongst agencies)



opportunities for growth of programmatic DOOH.

understanding of programmatic DOOH advertising is improving but continues to be an issue preventing it being a larger proportion of advertising volume.

Top issues preventing programmatic DOOH becoming a larger proportion of advertising volume





international update: state of the market

jean-christophe conti

ceo

viooh



IAB Australia: Powering DOOH
4th April 2024

VIOOH

International Update: State of the Market

JC Conti, CEO, VIOOH

viooh.com
hello@viooh.com





Who are VIOOH?

Who are we?

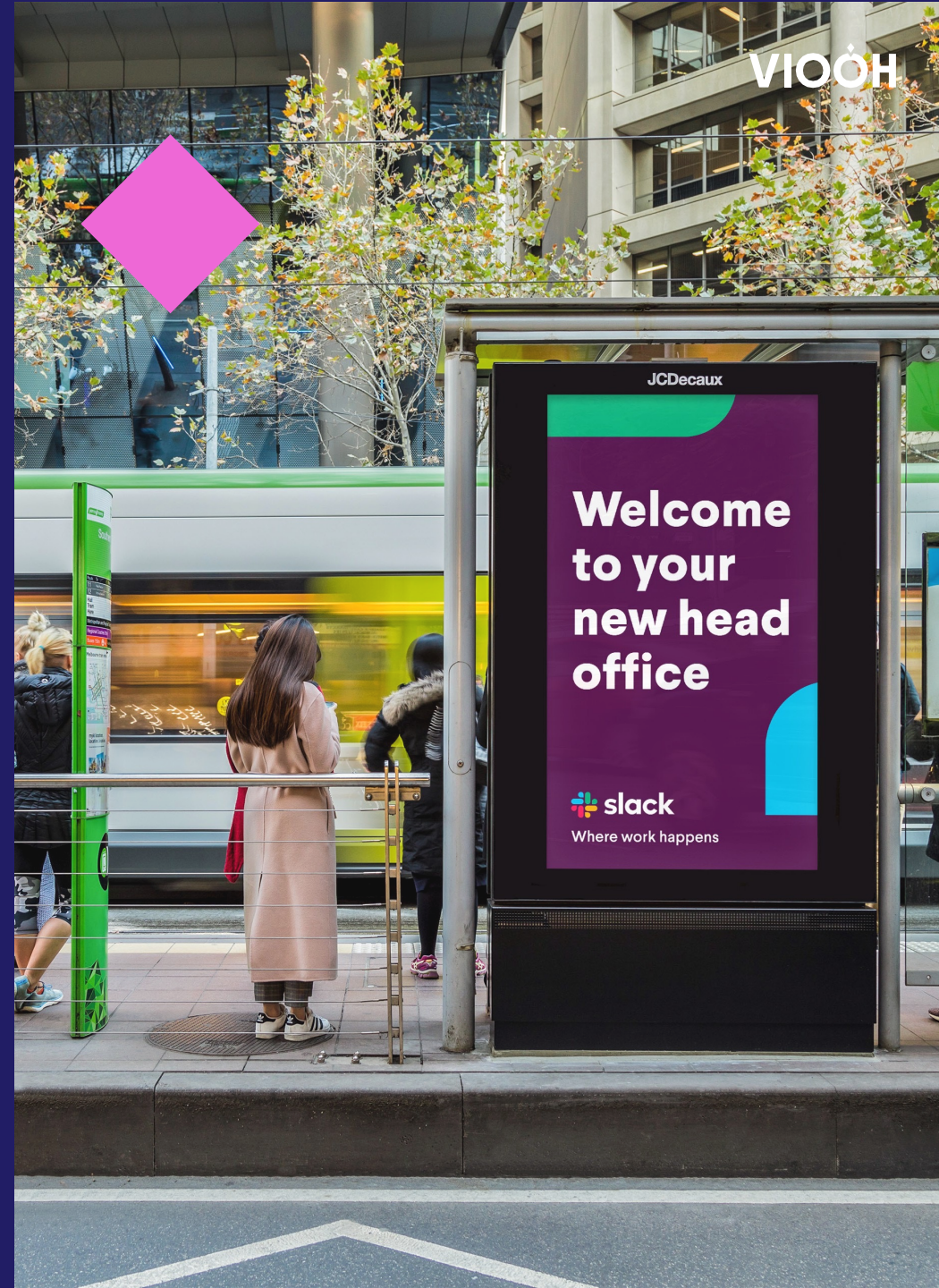
VIOOH

VIOOH

We are a global digital OOH marketplace...

Who are we?

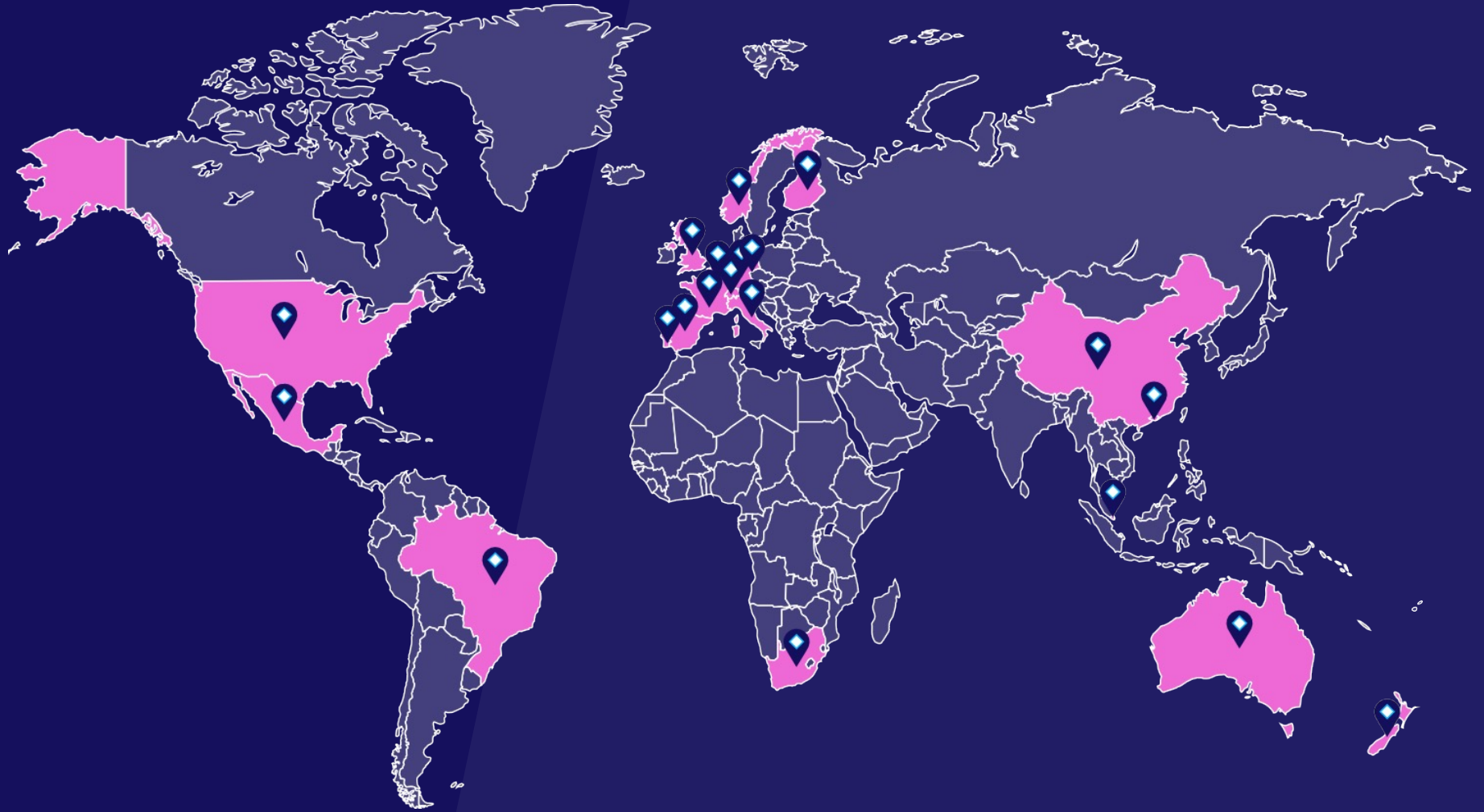
- ◆ Independent SSP/exchange, built to connect both supply & demand
- ◆ Thought leader in prOOH space and owner of industry-wide respected State of the Nation annual report
- ◆ Technology built by programmatic DOOH experts
- ◆ Live & trading programmatically in 22 countries
- ◆ Connected to market leading media owners with over 30,000+ DOOH screens available
- ◆ Connected to 44+ DSPs globally



Global reach with local expertise

Trading in 22 markets

- EMEA**
 - UK
 - France
 - Germany
 - Spain
 - Italy
 - Norway
 - Belgium
 - Austria
 - Netherlands
 - Switzerland
 - Finland
 - Portugal
 - Luxembourg
- Americas**
 - US
 - Brazil
 - Mexico
- MENA**
 - South Africa
- APAC**
 - Australia
 - New Zealand
 - Hong Kong
 - Singapore
 - Mainland China



Global Marketplace Partners:

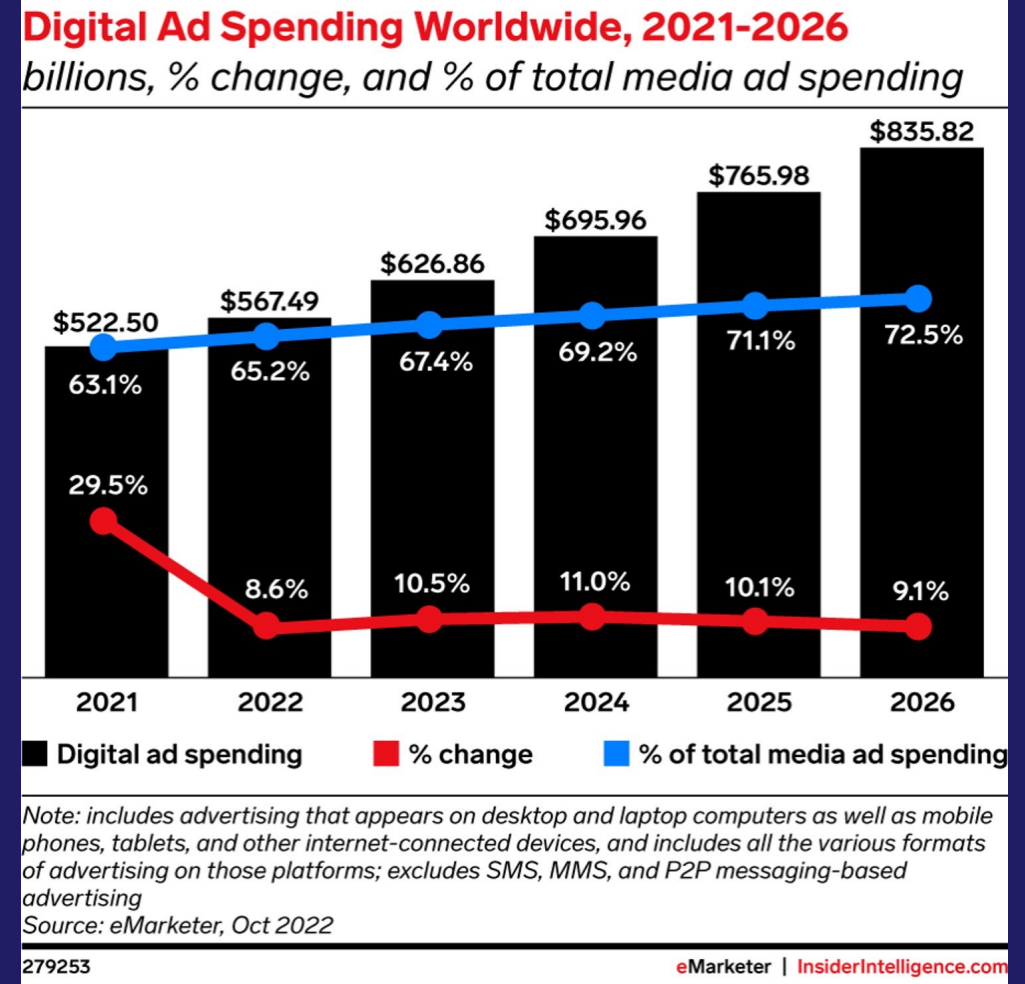


prDOOH: setting the scene



Global Digital Ad Market: An \$836bn opportunity in 2026

- ◆ Digital continues to dominate global ad spend, accounting for almost 70% of total spend on average, and more in many countries.
- ◆ Programmatic drives recovery and growth:
 - Programmatic advertising has been on a meteoric rise, with its share of digital ad spend worldwide growing to 85.7% in 2023.
 - Programmatic dominates digital display in mature markets (96% in UK in 2023*).
- ◆ DOOH has an opportunity to be part of the \$836bn (est.) digital ad spend, using programmatic DOOH.



DOOH buyers see the value of trading programmatically

32%

of media plans for campaigns placed in the last 18 months have included programmatic DOOH, forecast to increase to 40% in the next 18 months

33%

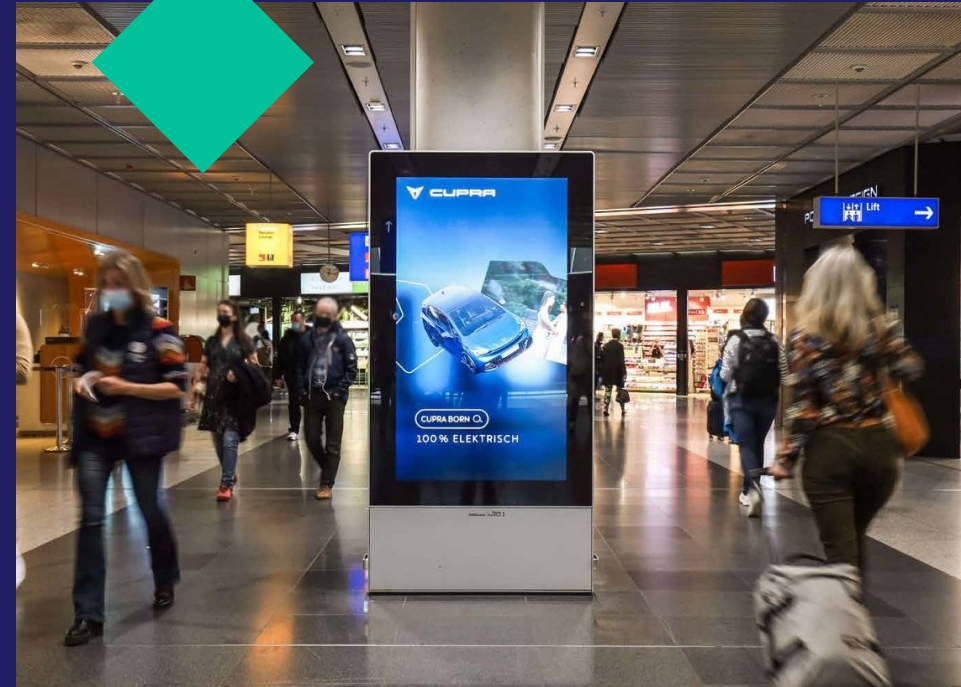
of executives have added incremental budgets to their prDOOH ad spend and are forecasting a further increase in 2024



DOOH buyers see the value of trading programmatically

83%

of advertisers believe that prDOOH offers the most innovative opportunities over any other media channel



prDOOH trends



Programmatic enables DOOH to address both brand and performance objectives

81%



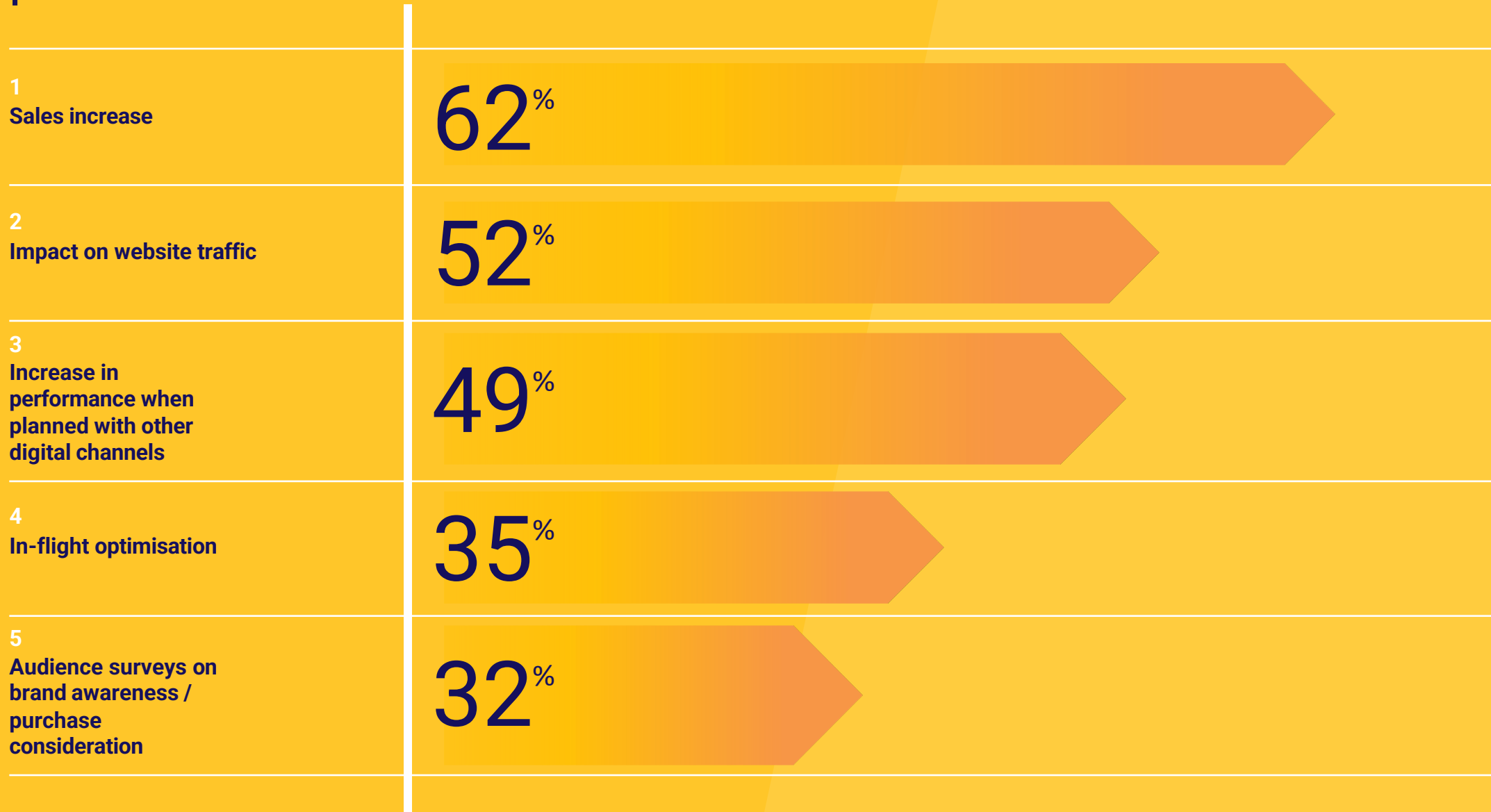
Performance-led campaigns

78%

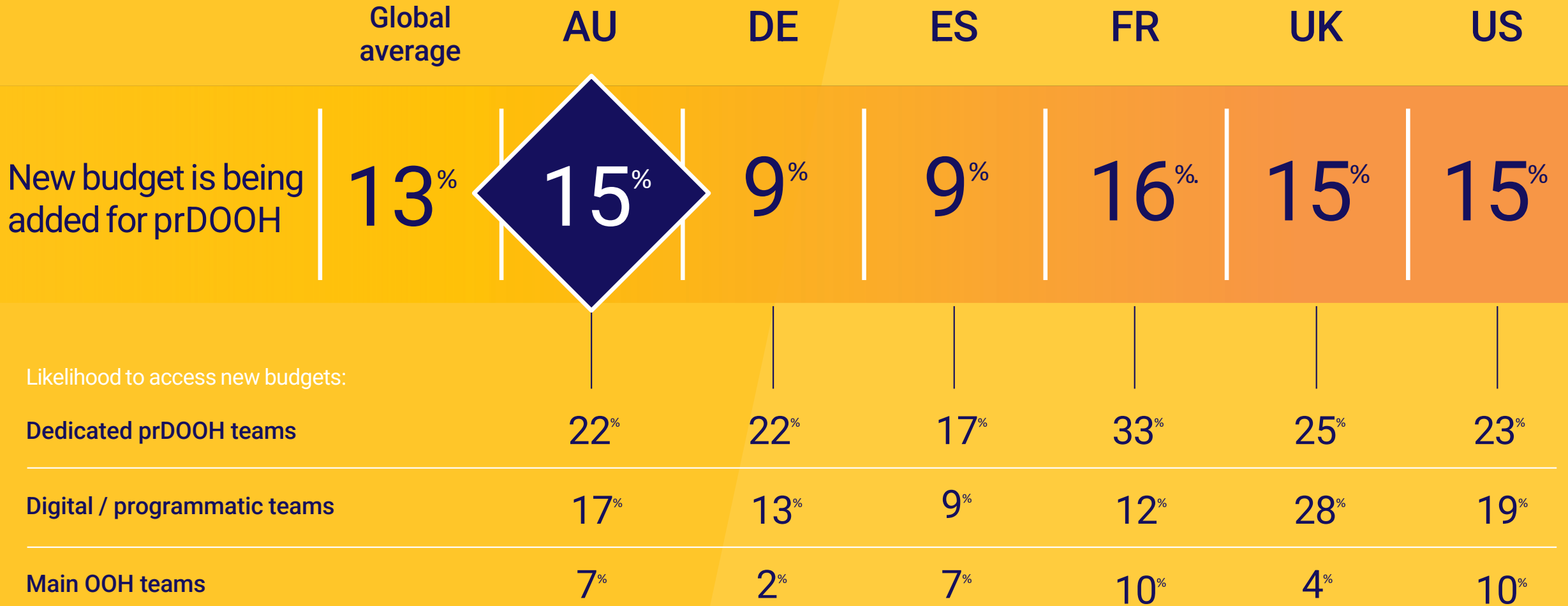


Brand-led campaigns

However, measurement of prDOOH efficiency is down to performance metrics



New budgets are being added into prDOOH



All advertiser verticals are spending in prDOOH

Verticals ranked by campaigns run in Australia in 2023

1 st	Entertainment/ Leisure/ Media	Global ranking: 7 th	
2 nd	Non-Fashion Retailers	Global ranking: 2 nd	
3 rd	Holiday/ Travel/ Transport	Global ranking: 6 th	
4 th	Financial	Global ranking: 5 th	
5 th	Government	Global ranking: 13 th	

Other verticals include:

Restaurant, Grocery/ Food, Personal Care, Utilities, Fashion/ Fashion Retailers

Australia is one of the leading markets in prDOOH adoption

- ◆ Programmatic DOOH is very popular in Australia, but it still has **room to grow**
- ◆ Out of the campaigns Australian advertisers have worked on in the past 18 months, on average **over a third (37%) have included prDOOH in the media plan vs. 32% globally**
- ◆ When traded programmatically, prDOOH enables media owners to address not only brand budgets but also performance budgets - **100% of campaign briefs are now addressable through prDOOH**
- ◆ Currently, **traffic to store/ traffic to web** are the main drivers to assess prDOOH performance in Australia
- ◆ Australian advertisers **tend to plan prDOOH as part of other OOH activities**, with dedicated prDOOH/ digital/ programmatic teams overseeing 39% of new budget allocation

Future growth levers in prDOOH



Future growth levers

1 Dynamic Creative Optimisation(DCO)

2 3D Creative

3 Multi-channel integration

4 Sustainability

41%

of consumers said they don't want advertisers to use tracking cookies

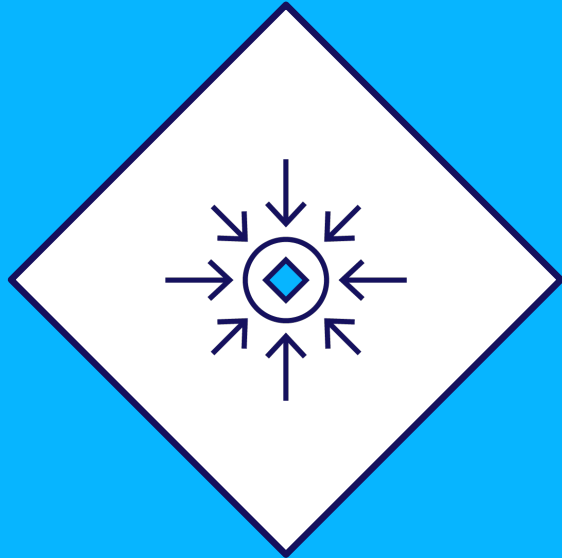
McKinsey, 2022

70%

of UK consumers are more likely to remember a contextually relevant ad

IAS, Power of Context Study, 2020

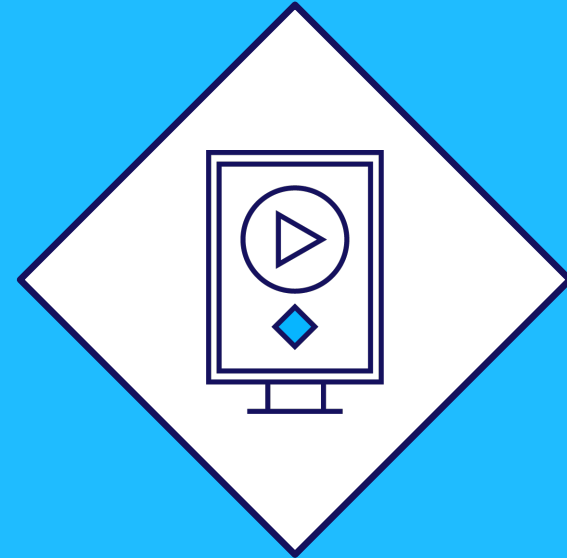
DCO: Context is crucial



Enhanced
relevance



Improved
customer
experience



Increased
advertising
efficiency

DCO: Contextual relevance at it's best



Advanced data sources

- ◆ First-party data sources from partnerships
e.g. Samsung + Strava
- ◆ Data from mobile applications
e.g. Uber, SkyScanner
- ◆ Stock data/ inventory management systems

Standard data sources

- ◆ Pollen data
- ◆ Weather data
- ◆ Traffic data
- ◆ Air travel data
- ◆ Pollution data

prDOOH + DCO = advertising magic

Dynamic messaging that changes in real-time to reflect consumer behaviour, mindset, stage in the customer journey


40'

<i>Paris Saint Germain (PSG)</i>		<i>0</i>
<i>Bayern Munich</i>		<i>0</i>



DANGEROUS ATTACK
South Melb

PARIONS SPORT
EN LIGNE



Cotes susceptibles d'évoluer.

**LES JEUX D'ARGENT ET DE HASARD PEUVENT ÊTRE DANGEREUX :
PERTES D'ARGENT, CONFLITS FAMILIAUX, ADDICTION...
RETROUVEZ NOS CONSEILS SUR JOUEURS-INFO-SERVICE.FR
(09 74 75 13 13 - APPEL NON SURTAXÉ)**

GOVERNEMENT

prDOOH + DCO = advertising magic

Dynamic messaging that changes in real-time to reflect consumer behaviour, mindset, stage in the customer journey

46'

<i>Paris Saint Germain (PSG)</i>		<i>0</i>
<i>Bayern Munich</i>		<i>0</i>

PARIONS SPORT
EN LIGNE

MARDI 14/02 À 21H

PAR vs BAY

1 **12.50** N **4.20** 2 **3.755**

TELECHARGEZ L'APPLI **PARIONS SPORT** EN LIGNE

LES JEUX D'ARGENT ET DE HASARD PEUVENT ÊTRE DANGEREUX : PERTES D'ARGENT, CONFLITS FAMILIAUX, ADDICTION... RETROUVEZ NOS CONSEILS SUR JOUEURS-INFO-SERVICE.FR (09 74 75 13 13 - APPEL NON SURTAXÉ)

GOVERNEMENT

prDOOH + DCO = advertising magic

Streamlines the creation & delivery of 1000s of personalised, and pre-approved ad variations

18/10/2022	AUSTRALIA
19/10/2022	BELGIUM
20/10/2022	USA
21/10/2022	NETHERLANDS
22/10/2022	FRANCE

KEY VISUAL	ENGLISH	3PM
PRE GAME	DUTCH	4PM
POST LOSS	SPANISH	5PM
POST WIN	PORTUGUESE	6PM
HERO VISUAL	FRENCH	7PM

COUNTRY
DATE
TIME
LANGUAGE
CONDITION

DE DUIVELS STAAN IN VUUR EN VLAM
 VOEL HET OP HET GROOTSTE PODIUM

PS5
 FIFA 23
 PLAY HAS NO LIMITS

prDOOH + DCO = advertising magic



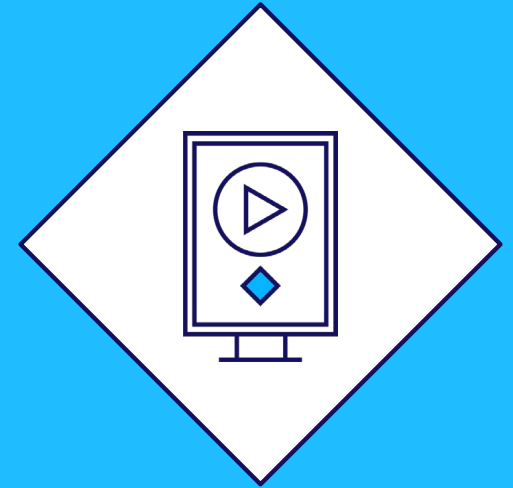
Contextually
relevant
experiences



Dynamic
messaging



Streamlined ad
creation and
delivery process



Creativity!

Future growth levers

1 Dynamic Creative Optimisation(DCO)

2 3D Creative

3 Multi-channel integration

4 Sustainability

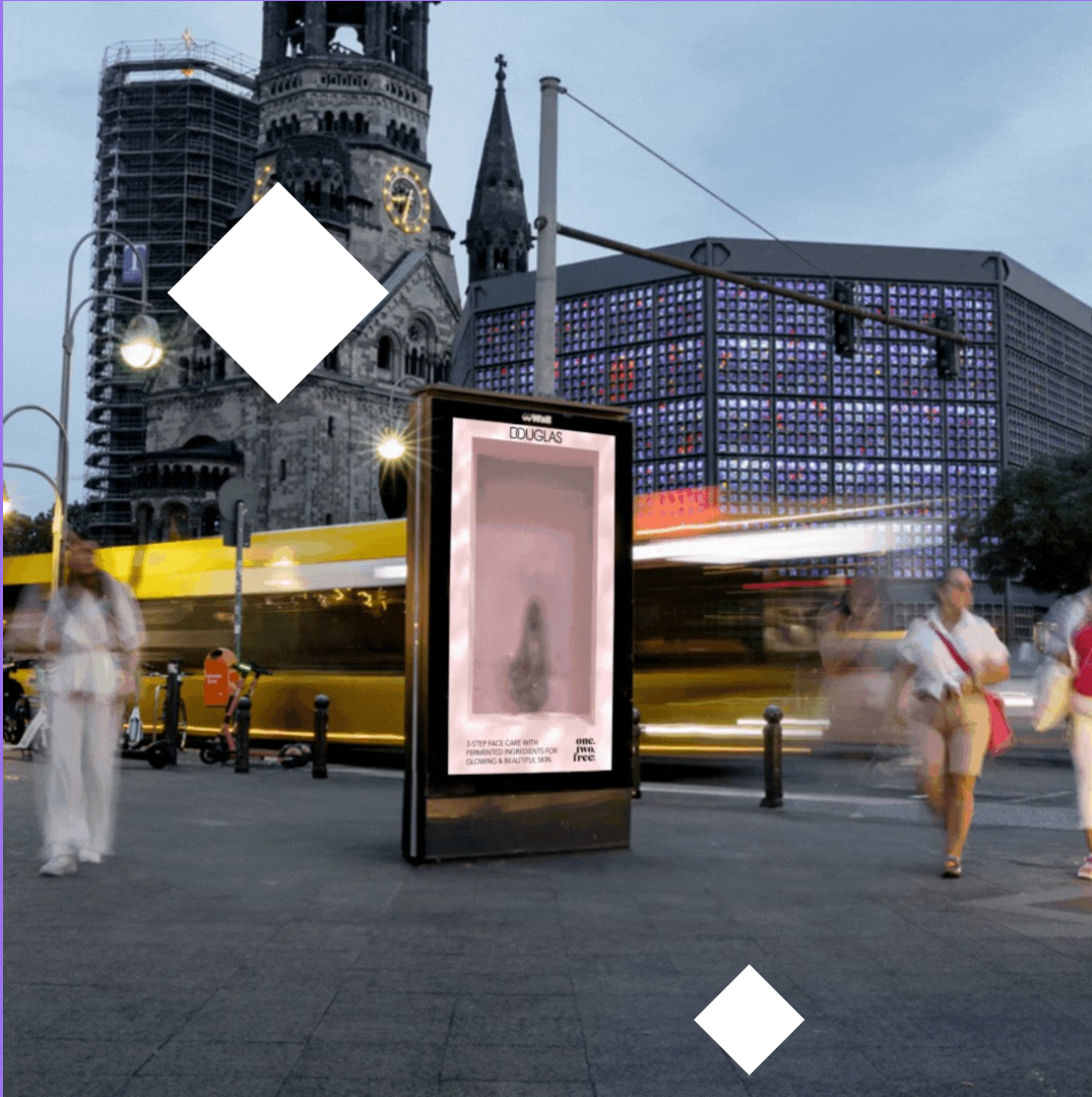
3D Creative

40

%

3D advertising
boosts conversion
rates by 40%
compared to
traditional advertising

Forbes, 2022



3D Creative

Immersive brand experiences

Making advertising at 'iconic' locations reach even further

Attention: reaching desirable audiences including Gen-Z

Pushing boundaries between art and advertising



Future growth levers

1 Dynamic Creative Optimisation(DCO)

2 3D Creative

3 Multi-channel integration

4 Sustainability

Multi-channel integration: connecting with consumers throughout their day

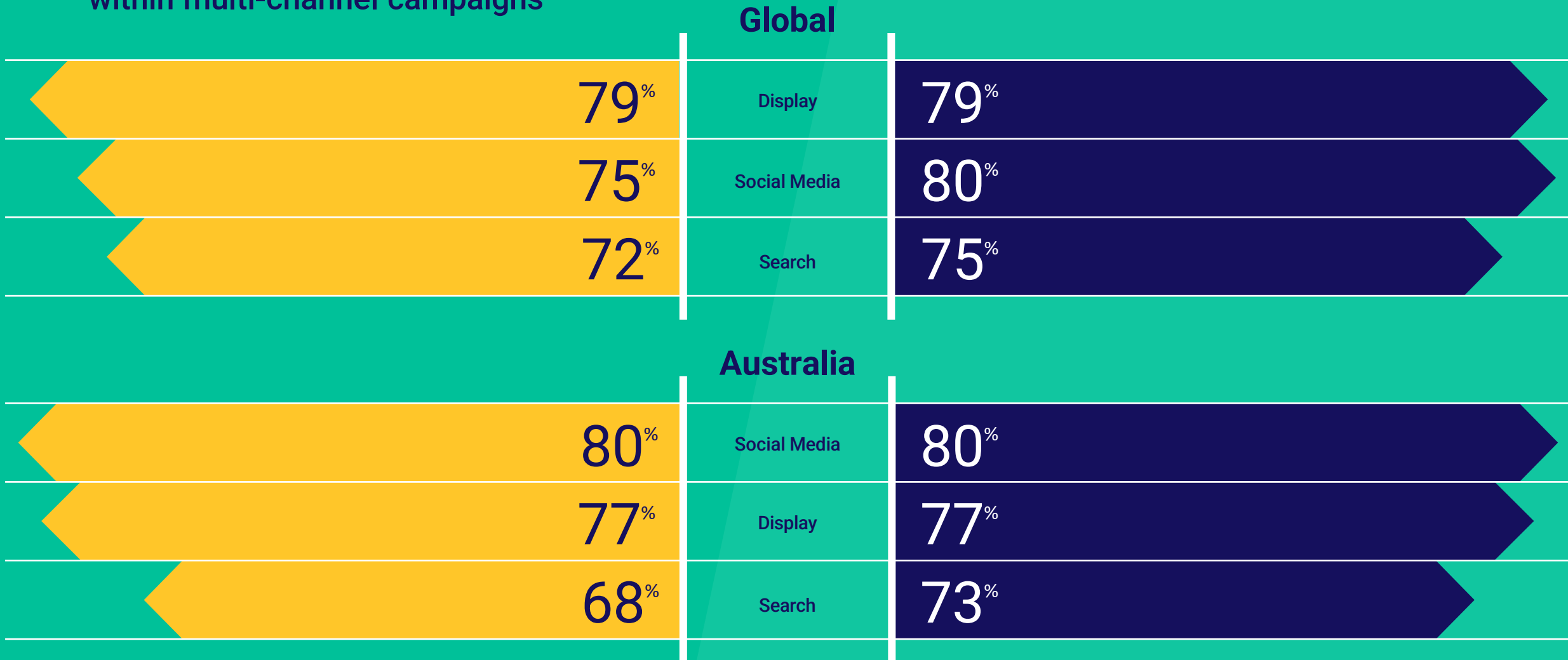


Get up → Commute → Work → Commute → Home entertainment

Multi-channel integration for both brand and performance

Programmatic DOOH aligns easily within multi-channel campaigns

◆ Performance-led campaigns ◆ Brand led campaigns



Multi-channel campaigns are key to delivering profitable outcomes

2.6

The average campaign is 2.6x more effective with a different allocation of spend across several media channels*

9.5%

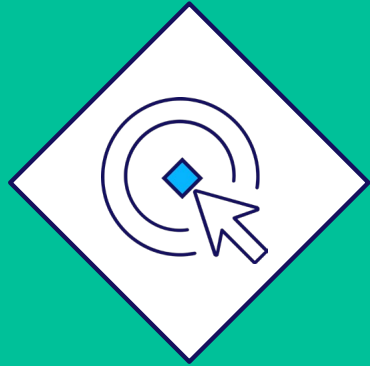
Companies with strong multi-channel marketing see a 9.5% increase in annual revenue on average**

*Source: Oxford University, Said Business School and Kantar, 'No Silver Bullet' 2022

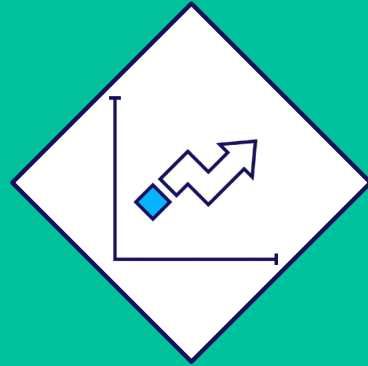
** Source: Digizuite

Multi-channel campaigns are key to delivering profitable outcomes

Including prDOOH in a multi-channel media plan adds clear incremental value to the ROI of the digital media mix:



Improved click-through rates on mobile re-targeting

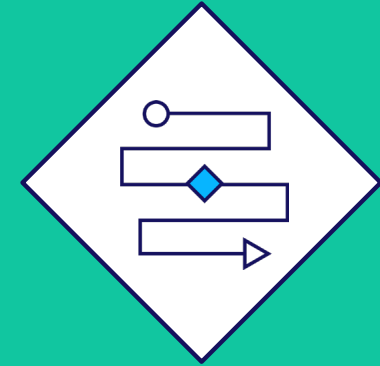


Increased website visits attributable directly to prDOOH

prDOOH also boosts offline outcomes within multi-channel campaigns:



Sales



**Footfall/
visitation**

Future growth levers

1 Dynamic Creative Optimisation(DCO)

2 3D Creative

3 Multi-channel integration

4 Sustainability

Sustainability: The rise of the 'eco-friendly' consumer

80%



of consumers will favour brands that are actively working to reduce their carbon emissions

Sharethrough, 'Consumer Understanding of Internet Carbon Emissions', May 2022

81%

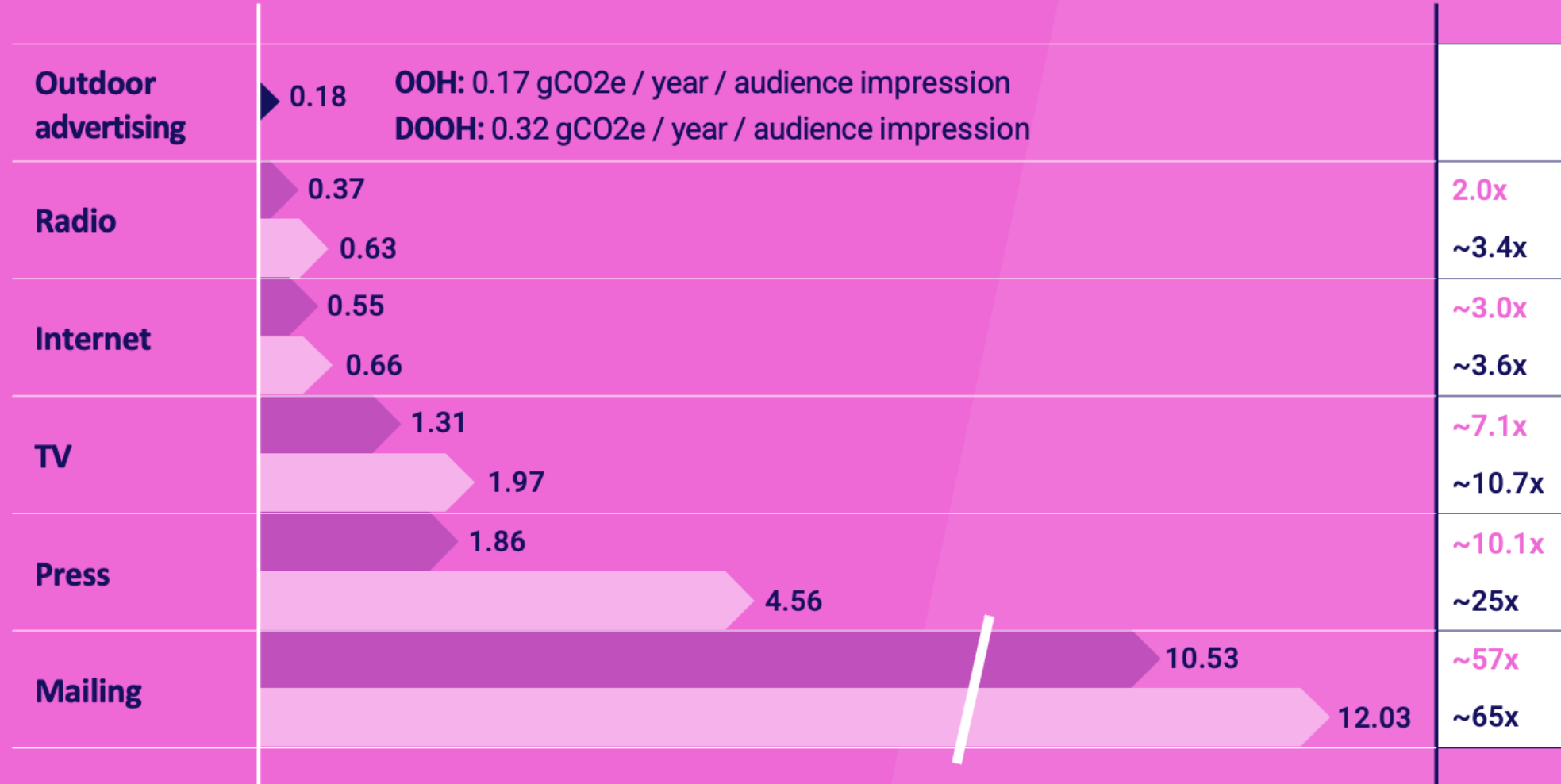


of people surveyed expect companies to be environmentally conscious in their advertising and communications

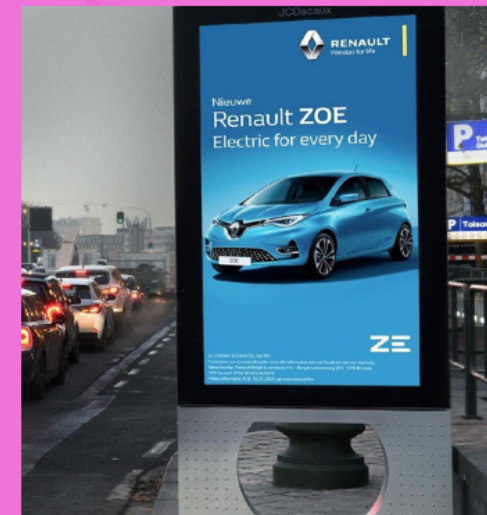
Global Consumer Insights Survey 2021, PwC

Outdoor advertising emissions relative to audience are lower than for all other media on their advertising activities

GHG emissions of advertising activities of main medias in France [gCO2e / year / audience impression, 2021]



- Low scenario
- High scenario
- Comparison with outdoor advertising footprint, pro-rated to the relative audience weights of OOH and DOOH



VI00H x Cedara: industry-first carbon emissions measurement

VI00H's carbon emissions for 2022 hit:



18%

below the
programmatic
open web
benchmark

Broadcast medium,
reaching a one-to-many
audience

Easy integration into multi-
channel programmatic
media strategies

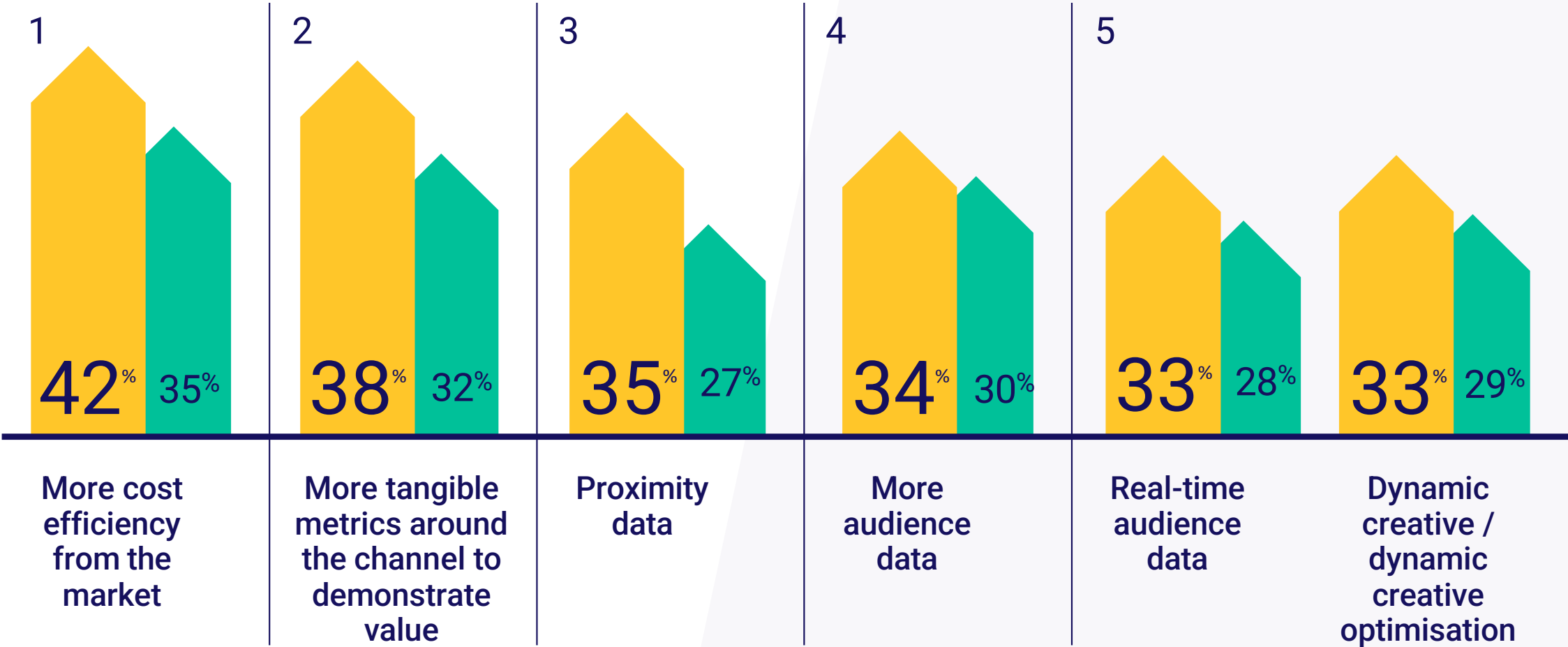


A future
look at
prD00H



Top 5 needs to drive investment in prDOOH

Australia Global



Thank you

case study:

benefits of utilising programmatic dooh for global campaigns reach



christina natassia templin
senior manage, global marketing
fiji airways



steve satinoff
founder
your media consultant



erin koedam
sales director, australia
hivestack



Benefits of using Programmatic DOOH for global reach

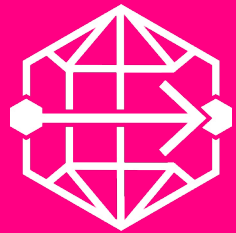




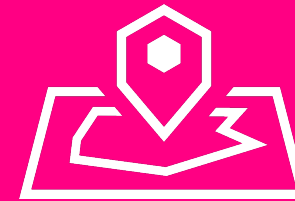
FIJI AIRWAYS



Core objectives of the campaign included:



**Drive Brand Awareness
across several key
markets**



**Build brand loyalty using
a data-driven
approach**

Across the following key markets,
simultaneously:

USA

Australia

New Zealand

Hong Kong

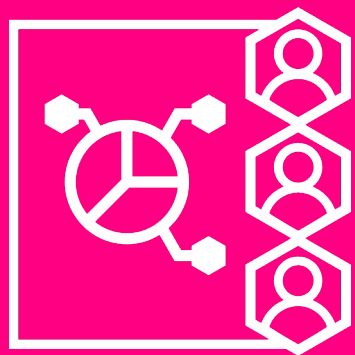
Singapore

China

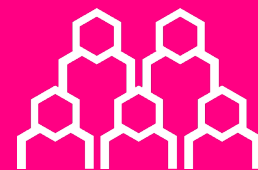
Japan



The campaign leveraged the Hivestack platform to activate against relevant audiences at scale.



Pre-Built Audience Segments



Demographic



Behavioural



Contextual

Bespoke custom audiences were created within the Hivestack platform

The screenshot displays the Hivestack DSP interface for a custom audience named "Fiji Airways Custom Audience 2". The interface includes a sidebar with navigation options such as Overview, Planning, Buy, Audience, and Marketplace. The main content area shows the audience's status as "Pending" with a last modified date of "Oct 26, 2023, 9:47 PM". Below this, the "Details" section lists two audience segments: "Family Travellers" and "Leisure Travellers".

Segment Name	Description	Reach
FAMILY TRAVELLERS (LIFESTYLE)	Devices seen travelling to popular family vacation destinations in the last 90 days	15,640,887
LEISURE TRAVELLERS (LIFESTYLE)	Devices seen travelling to popular leisure destinations in the last 90 days	8,999,089



Custom Audience Segments

Dayparting was also applied for the most ideal times of day and peak hours.

Hivestack | DSP

Campaigns > Fiji Airways AU - Q3 2023

Fiji Airways

Completed | 10/27/2023 - 11/27/2023 | **FIJI AIRWAYS** | ACCOUNT | Nov 23, 2023, 5:25 PM | LAST MODIFIED ON | -- | LAST PLAYED ON

Pacing strategy
Optimized
Optimized pacing is best if your priority is to distribute your budget according to audience density and concentration, and to distribute spend evenly across weeks.

Daypart

	12 AM	1 AM	2 AM	3 AM	4 AM	5 AM	6 AM	7 AM	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM	8 PM	9 PM	10 PM	11 PM
Monday																								
Tuesday																								
Wednesday																								
Thursday																								
Friday																								
Saturday																								
Sunday																								

Creatives

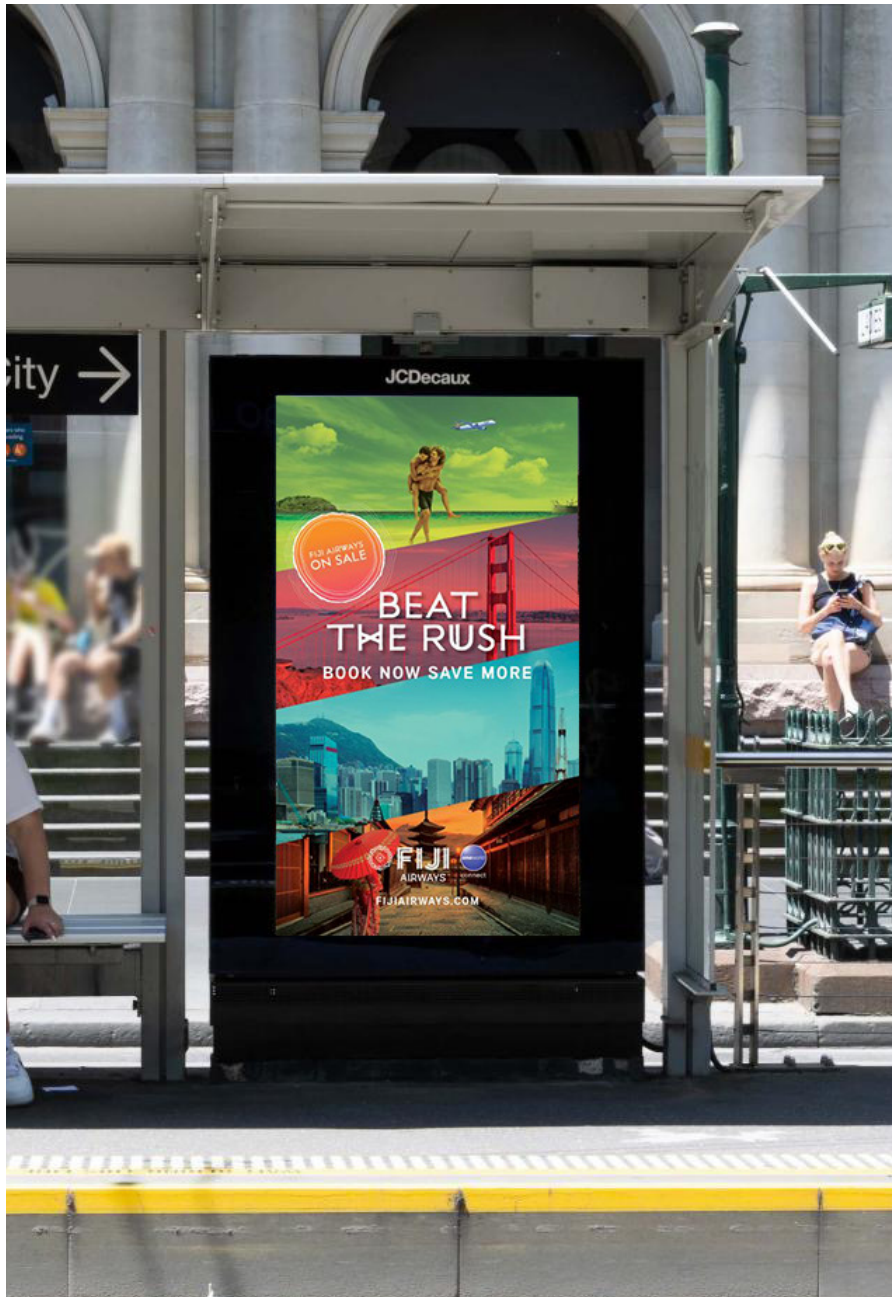
THUMBNAIL	NAME	TARGETING	ADVERTISER	STATUS	ACTIVE?	FROM	TO	WEIGHT	LAST PL
	Fiji Airways - Global Sale	-	FIJI AIRWAYS (fijiairways.com)	Approved	Yes	-	11/23/2023	1 (11.1%)	-
	Fiji Airways - Global Sale MP4	-	FIJI AIRWAYS (fijiairways.com)	Partially approved (1/2)	Yes	-	11/23/2023	1 (11.1%)	-



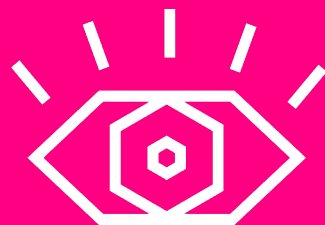
Departing Capabilities

And then utilised to retarget audiences
across other media channels





The results?

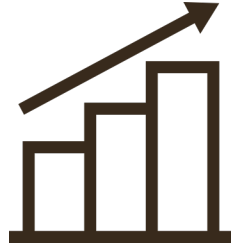


Over-delivered in impressions by

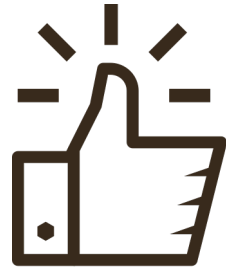
79,400,000

Worldwide Impressions





One brand lift study saw...



76%

Improved Brand
Impression



77%

Increased Intention to choose Fiji
Airways in the future



Demonstrating programmatic
DOOH's ability to deliver
first-class results.



FIJI

AIRWAYS

In collaboration with



Hivestack

by Perion

M

jcdecaux programmatic DOOH campaign of the year



elizabeth mcIntyre
ceo
oma



brad palmer
national programmatic
director
jcdecaux



mark ryan
senior client director
um



paul swann
executive creative tinker
thinkerbell

GUINNESS



BREWERY OF
METEOROLOGY

PERFECT
WEATHER FOR
A GUINNESS

REGISTER FOR
YOUR FREE PINT



Get the best
Drink
Wise.
org.au

GUINNESS

Qantas Meeting

Gate
11

JCDecaux

Gate
10



JCDecaux PROGRAMMATIC

CAMPAIGN OF THE YEAR AWARD

40%

Use of data and unique programmatic
Out-of-Home features

25%

Engaging creative concept

35%

Tangible campaign results

JCDecaux PROGRAMMATIC
**CAMPAIGN OF
THE YEAR**
AWARD

WINNER

GUINNESS

BREWERY OF METEOROLOGY

"Customising the creative by location to deliver a tangible value exchange was really smart, particularly on a limited budget."

Award judge Joe Lunn, Uber, APAC Head of Media



Client: Lion DSP: Vistar Media Agency: UM Creative agency: Thinkerbell Trading desk: Kinesso

GUINNESS | Brewery Of Meteorology

Objective

Challenge Australia's summer beer dominance and create new cold weather moments

Data & Programmatic Features

When temperature dropped to Cold or Very Cold, city-specific weather triggered ads appeared.

Leveraging proximity data, panels near pubs directed customers inside to claim a free pint.

Creative Concept

21 different dynamically optimised creatives encouraged registration using QR codes



Category: **Alcohol**

DSP: **Vistar**

Agency: **UM**

Timing: **June - August 2023**

Formats: **Small Format, Airport, Transit**



Guinness Brewery of Meteorology | Campaign Results

+11.8M

Impressions across
2,748 placements

+18%

Increase in revenue
YoY

+3pt

growth in brand
salience

+17%

Increase in
brand power

+15%

Uplift in foot traffic
to pubs – (2000 free
samples given)

+100k

Incremental pints drunk
in winter (+13% increase
in consumption YOY)

JCDecaux PROGRAMMATIC

**CAMPAIGN OF
THE YEAR**
AWARD

new

dooh working group chairs



brad palmer

national programmatic director
jcdecaux



james lambert

head of advanced dooh
groupm nexus

pDOOH driving retail sales



gail halbert
head of client service
hearts and science



nick cook
gm marketing
mad mex



becks pirrie
group sales manager
vistar media

Mad Mex drives 9% sales uplift with DOOH

Mad Mex teamed up with Vistar Media for a dynamic programmatic DOOH initiative, swiftly tackling footfall challenges and driving sales growth. The mission? Engage consumers at the point of purchase and guide them seamlessly into Mad Mex stores. The campaign required immediate activation, emphasizing real-time optimisation with sales data to promptly support stores in need of a sales boost.

DAILY STORE-LEVEL SALES DATA

1KM POI TARGETING

PROXIMITY FOCUSED MESSAGING

BUS SHELTERS

URBAN PANELS

GROCERY STORES

MALLS



2.9M Consumers exposed to the sales-driven OOH panels

7% Transaction uplift

9% Overall sales uplift



“

Sales performance increases have been so well-received, that we are in the process of refining this partnership and strategy further. We're working to increase the complexity of sales data used significantly, to not only factor overall store sales but product sales too, activating to not only increase store footfall, but product sales as well. We are very excited to see how this solution will evolve and how this use of tech delivers for Mad Mex in the future.

Nick Cook | General Manager of Marketing at Mad Mex