



IAB Canada

Barometer Report:

The State of Digital OOH Advertising in Canada 2019

Member Survey Results: Year 3

April 2019

Introduction

Background

Mass mobile adoption and the use of data from mobile devices and cell towers have revolutionized the Out of Home (OOH) advertising platform. The OOH channel is now able to deliver advertising messages to audiences through more targeted and measurable means, utilizing technology and data for optimization, delivery and reporting.

Purpose

In this third annual IAB Canada survey of members about Location-based Advertising, we wanted to hear about the ways Digital Out of Home signage (DOOH) is being adopted and used within the advertising community.

Methodology

- 5 Minute Survey questionnaire, sent to IAB Canada member database,
- Sample composition: almost 60% 'buy-side'; 18% 'OOH vendors',
- In field 2 weeks: March 12-25, 2019,
- Respondent identity and answers confidential, results reported in aggregate only.

The Digital OOH Screens we are talking about.

The out of home industry has invested significantly over the past decade in the expansion of digital indoor and outdoor screen signage.

Illuminated from within by a matrix of LEDs, DOOH screens are capable of displaying several full-colour messages in rotation, including fixed or moving video and special transition effects.

Brighter and crisper than standard billboards, the outdoor lighting level is automatically dimmed at night.

Transit DOOH example



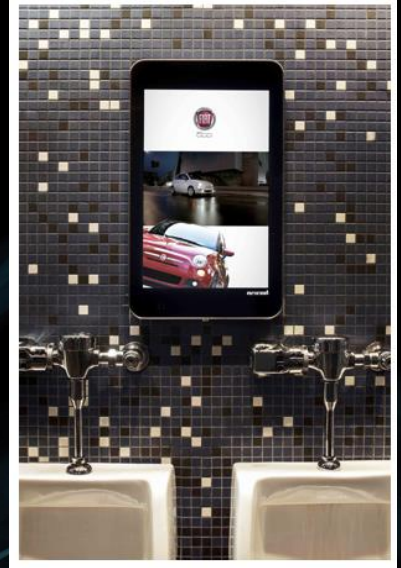
Venue DOOH signage



OUTdoor DOOH example



INdoor DOOH examples



Top Level Findings.

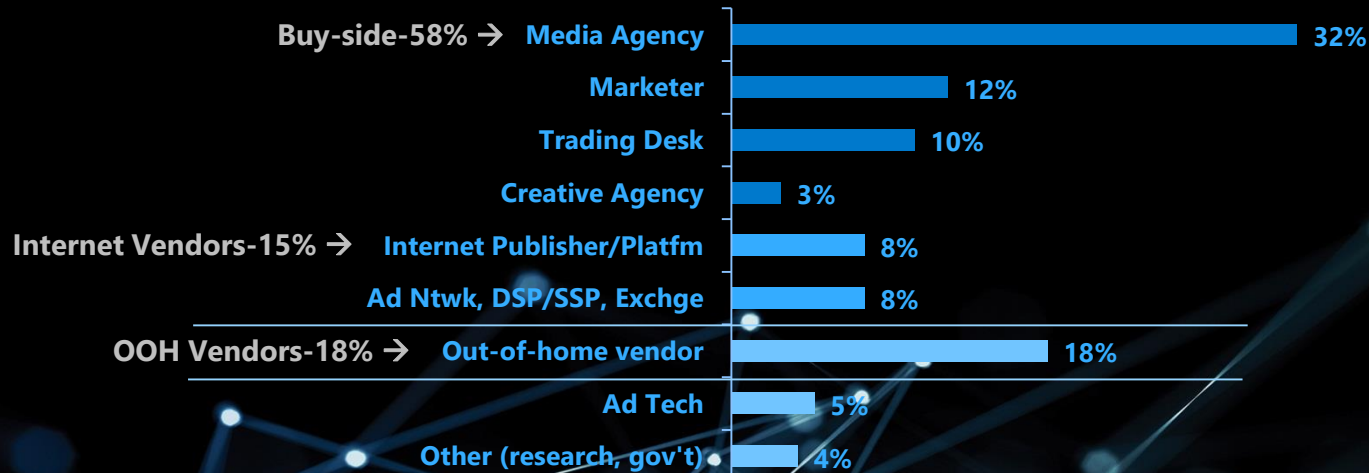
A powerful channel with lots of upside!

- DOOH is going programmatic,
- Advertisers recognize its targeting strengths, synergy with Mobile,
- Opportunity to build familiarity with - audience vs location buying, who buys programmatic,
- Industry seeks standardization of measurement,
- Major education opportunity.

Who responded: Majority are buy-side.

Almost 60% Buy-side (half are 'key/final' decision makers);
33% Internet or OOH Sellers.

Type of company you work for:
- percent of total sample -



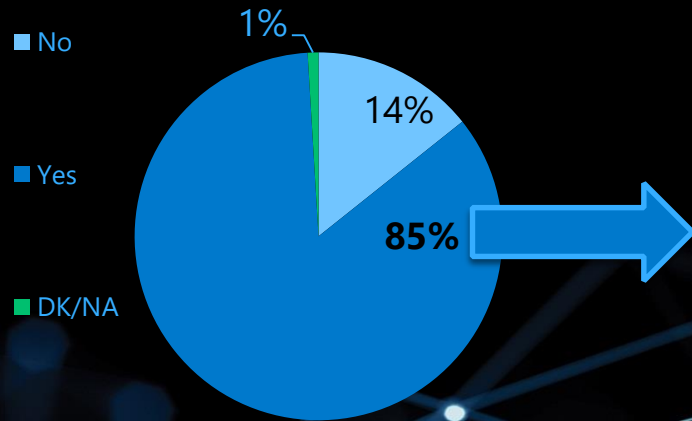
Experience with Digital OOH

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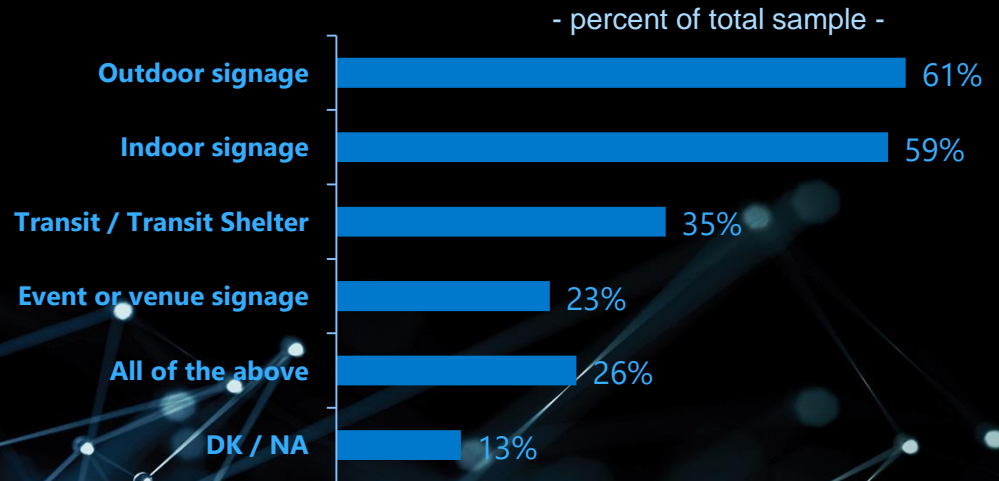
Most have actually bought or sold Digital OOH – stable!

Indoor and Outdoor signage are the most commonly used, similar to last year.

Actually bought/sold DOOH,
past 12 mths (firm or clients)
- percent total sample -



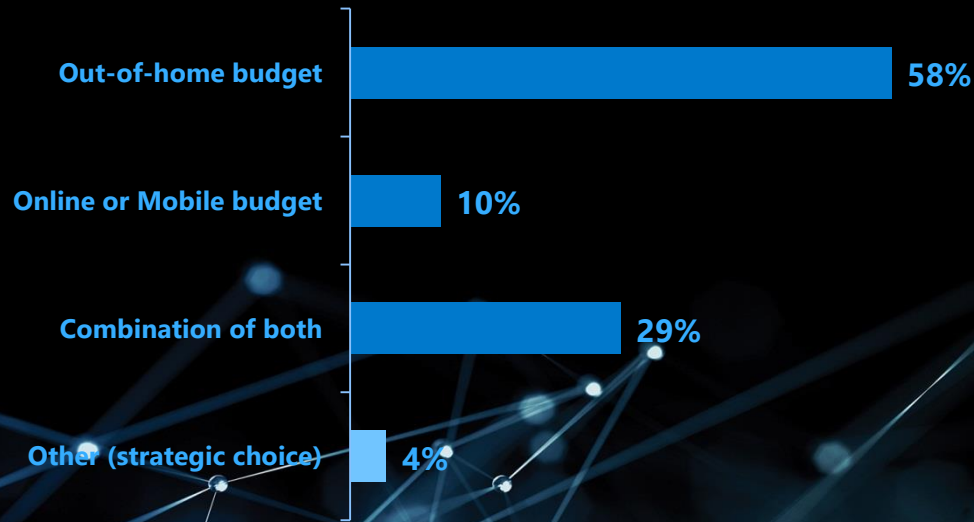
TYPES OF SIGNAGE bought or sold, past 12
months (multiple choice)
- percent of total sample -



OOH Budgets mostly fund DOOH with help from Mobile.

Six-in-ten (58%) source DOOH funding from overall OOH campaign budget; three-in-ten (29%) from both OOH and Mobile budgets.

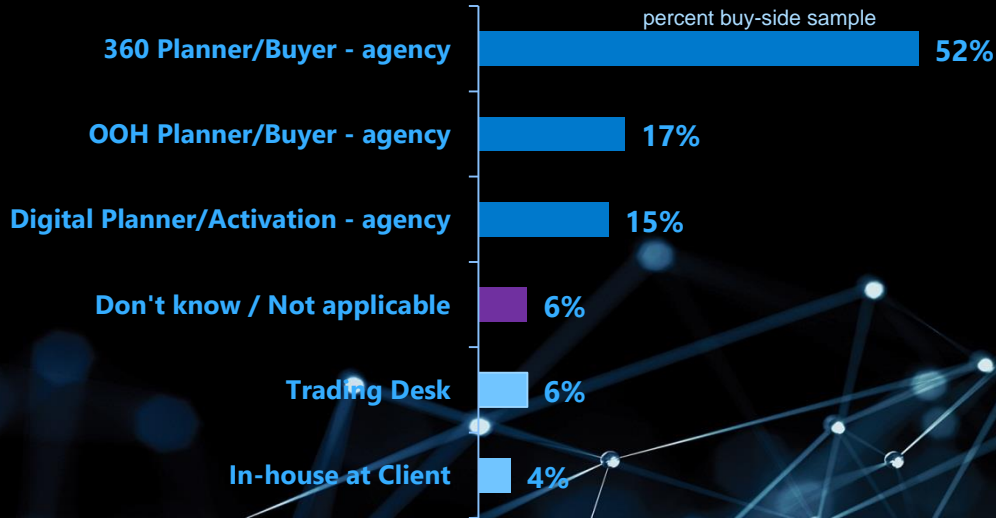
Where Digital OOH advertising budget comes from
- percent of buy-side sample -



Integrated planners buy DOOH the 'traditional' way.

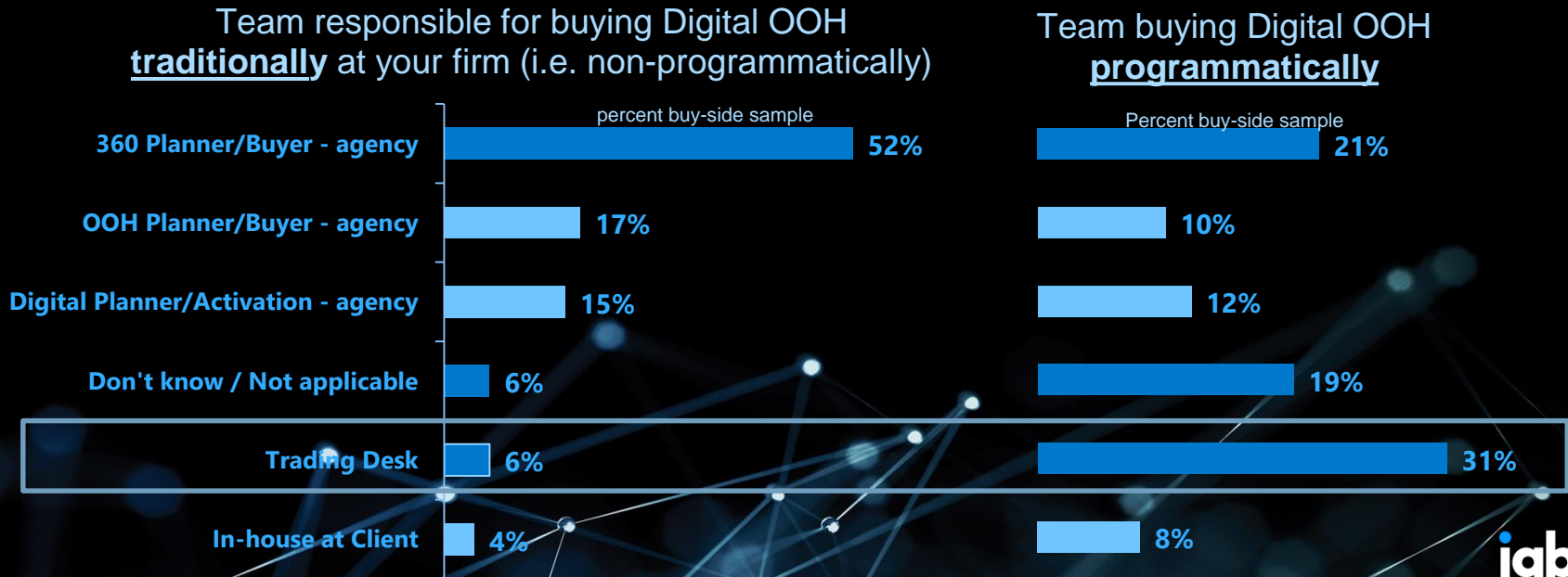
The Integrated Planner is dominant, plus some OOH and Digital specialists.

Team responsible for buying Digital OOH traditionally at your firm (i.e. non-programmatically)



Programmatic DOOH shifting to 'trading desks'.

Trading Desks expanding into programmatic buying at agencies, with fewer 360 Integrated Planner/Buyers involved.



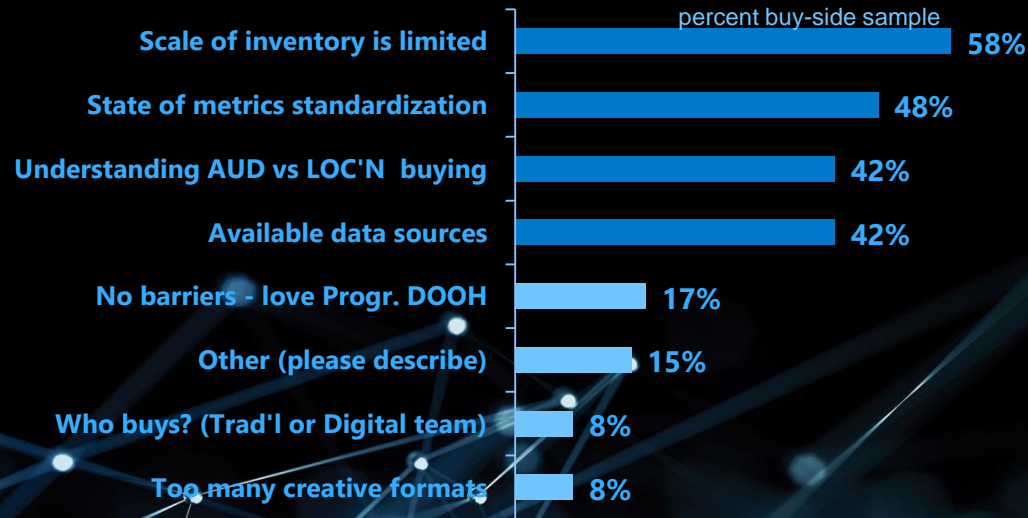
Opportunities vs Obstacles

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Scale & Standards are Key Growth Opportunities for Buyers.

Lack of standardized metrics and inventory limitations are top of mind, and the need to better understand audience vs location buying differences.

BUY-SIDE cites these BARRIERS to clients investing / adopting Programmatic DOOH.



Here are some of the "Speed Bumps".

Posted comments reflect inventory quality and location concerns..

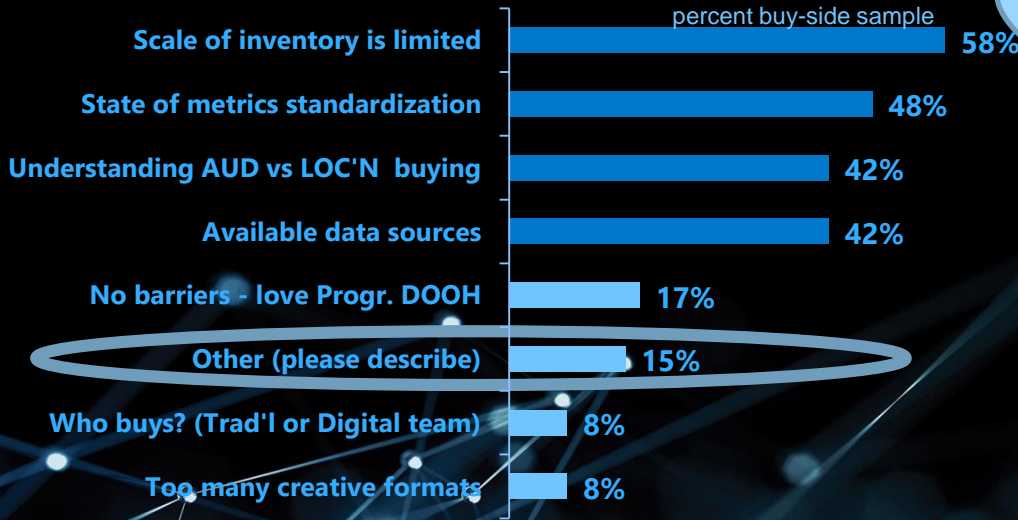
"Lack of control over the location - brand safety, viewability".

"Platforms have no idea if that board is behind a tree"

"We tend not to buy programmatic given it is remnant space".

"Cost and guaranteed inventory. Programmatic isn't always cheaper"

BUY-SIDE cites these BARRIERS to clients investing / adopting Programmatic DOOH.

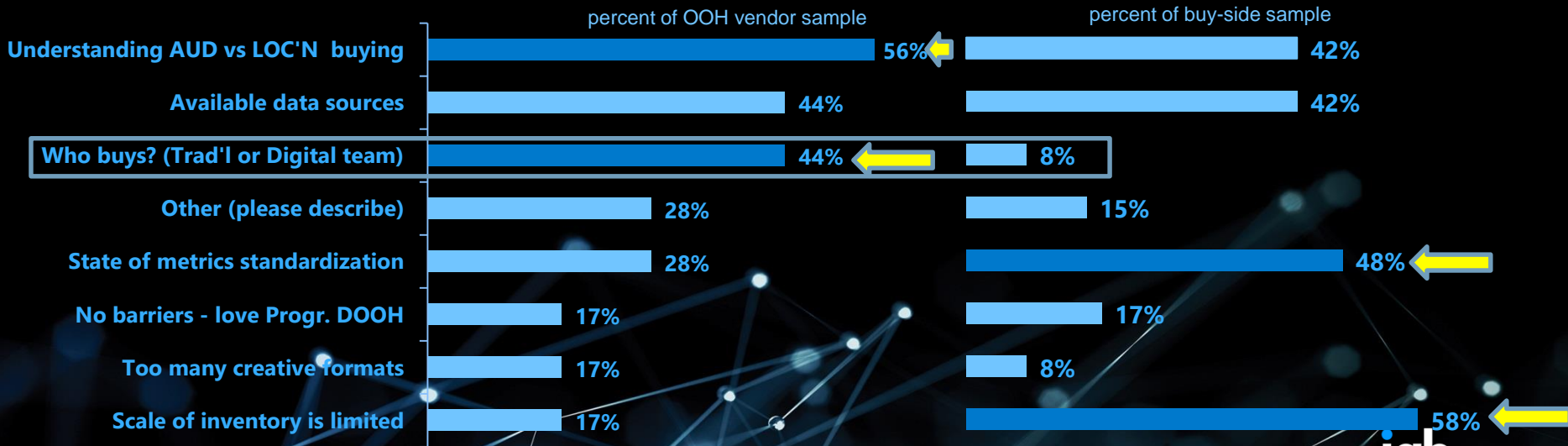


Vendors also seek clarity: Audience vs Location, Who Executes.

Less seller emphasis on inventory scale or standardized metrics concerns.

VENDORS cite these Barriers to clients (or agencies) investing / adopting Programmatic DOOH.

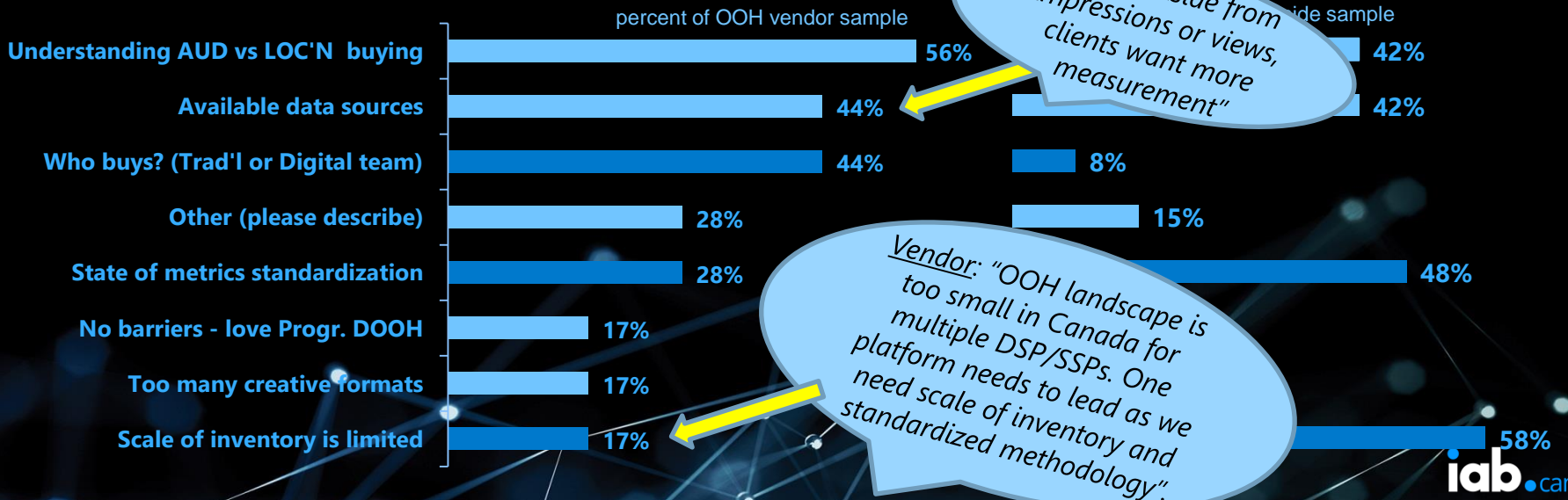
BUY-SIDE cites these BARRIERS.



Vendors recognize the need for more measurement and consolidation.

VENDORS cite these Barriers to clients (or agencies) investing / adopting Programmatic DOOH.

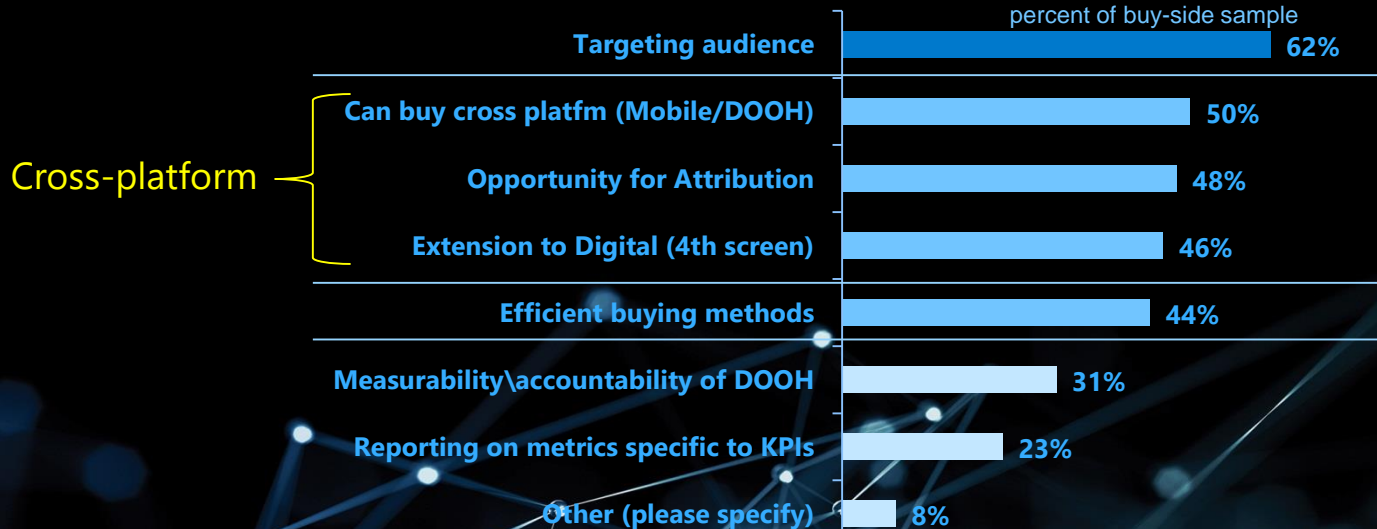
AGENCIES cite these BARRIERS.



Targeting and Cross-platform opportunities drive Programmatic.

Majority sees 'Audience Targeting' as the leading reason to buy DOOH programmatically, followed closely by Cross-platform benefits.

BUY-SIDE'S key REASONS for clients (or agencies) to invest/adopt Programmatic DOOH

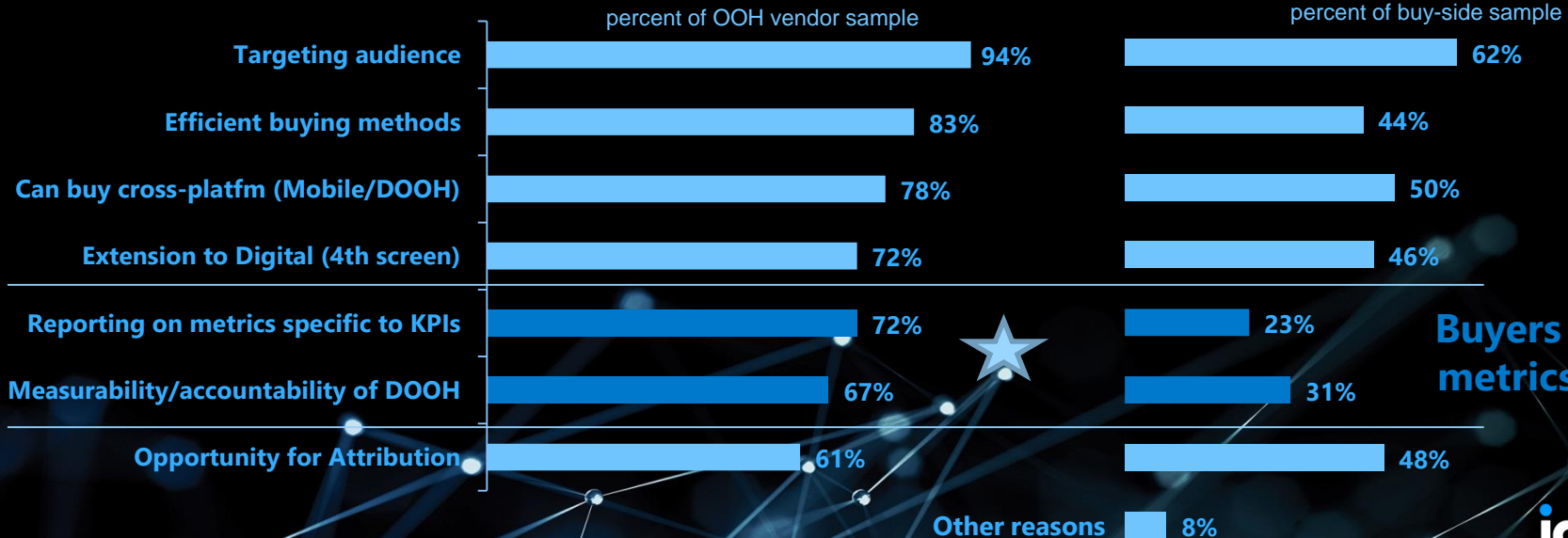


Vendors value all programmatic 'benefits' highly.

Almost all see 'Audience Targeting' as the leading reason for programmatic DOOH - followed by efficient methods, cross-platform and measurability.

VENDORS REASONS for clients (or agencies) investing in / adopting Programmatic DOOH.

BUY-SIDE REASONS

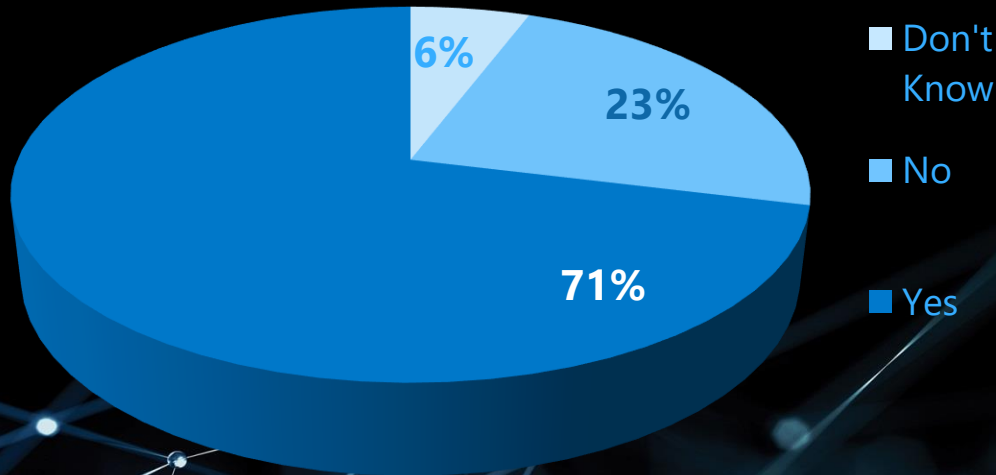


Buyers differ on metrics issues !!

Our community wants DOOH Training more than ever.

Almost three-quarters of the sample – total, buy-side and DOOH vendors alike - want additional training, way up over last year (56%).

Interested in further TRAINING on planning, buying or selling DOOH / applying mobile location data.
- percent of total sample -



Concluding Summary

A powerful channel with lots of upside!

- **DOOH is going programmatic** and Trading Desks are expanding to take it on,
- **Industry values** DOOH targeting, mobile synergy, programmatic's automated efficiency and measurability,
- **Wants to promote** greater understanding of audience vs location buying differences,
- **Buyers seek** greater scale, metrics standardized with other channels,
- **High interest** in DOOH and Location Data training on both sides,
- *New IAB Canada Member Education Series – DOOH Focus, launching 2019!*

Thank you for Supporting IAB Canada

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