



IAB Canada

Barometer Report:

The State of Digital OOH Advertising in Canada 2021

Member Survey Results: Year 4

April 2021

What do we mean by Location Based Advertising?

Dynamic DOOH landscape increasingly bought programmatically.

- capable of displaying several full-colour messages in rotation, including fixed or moving video and special transition effects.

AND

Non-traditional DOOH placements via social networks or mobile and rich location data informing all aspects of marketing and media strategy.

Location Data



Social Local Events



Venue DOOH signage



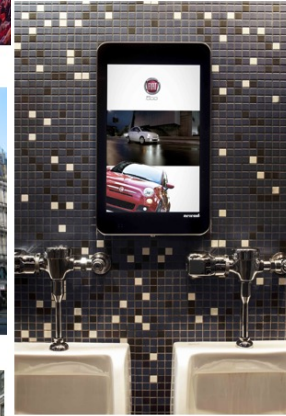
Indoor DOOH examples



OUTdoor DOOH example



Transit DOOH example



Setting the Stage for Year 4 Findings

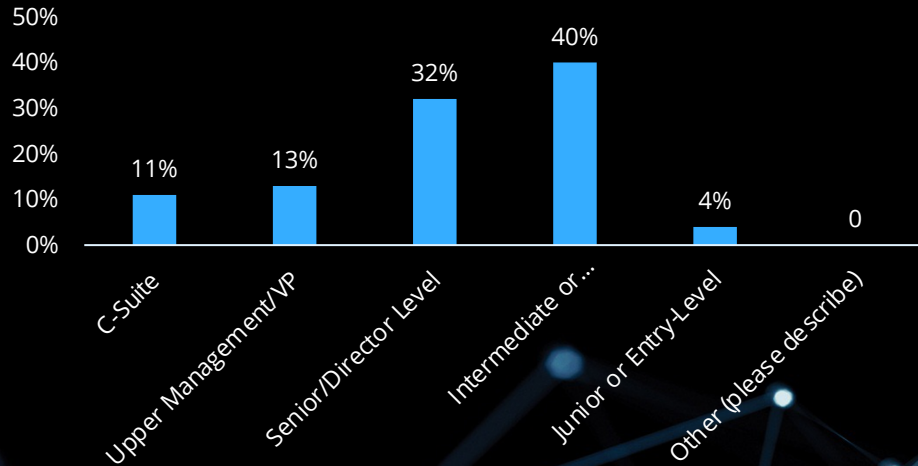
Untapped opportunities in a time of uncertainty

- Shifting landscape may affect access to rich data pools that have been invested in refining the DOOH and LBA platforms.
 - IDFA/Cookie deprecation
 - Privacy Reform
- Covid-19 sure to have impacted results for this 4th year of LBA data.
- DOOH has been in the development trenches – a lot of opportunities for advertisers to tap into advanced tools and to leverage location data to enhance both media and marketing strategies.

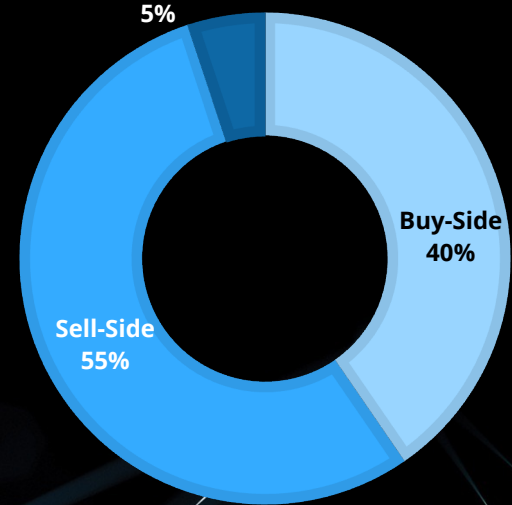
Barometer Respondents

Intermediate decision makers – Buy & sell-side respondents

Respondent Profiles



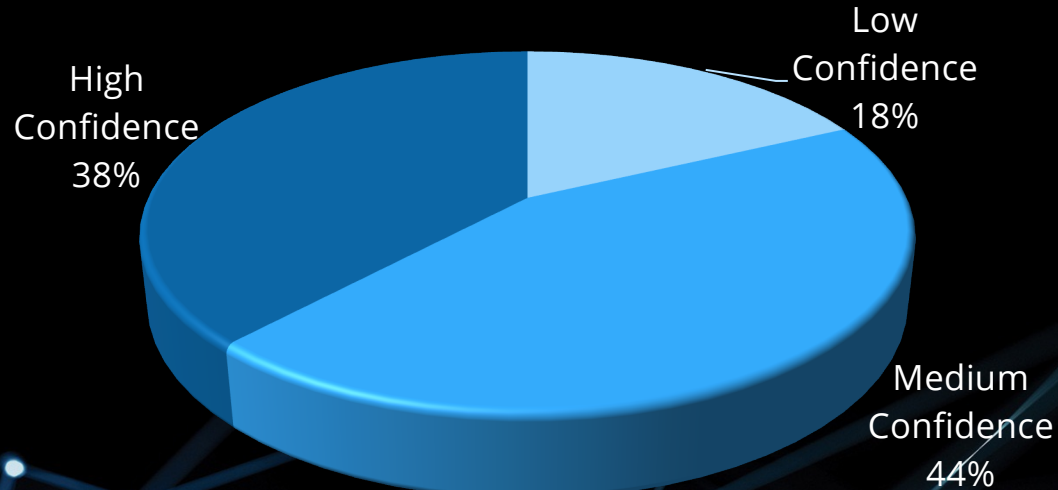
Research/Measurement Supplier



Are We Ready for Cookie Independence?

62% Not fully confident in Cookie Independence

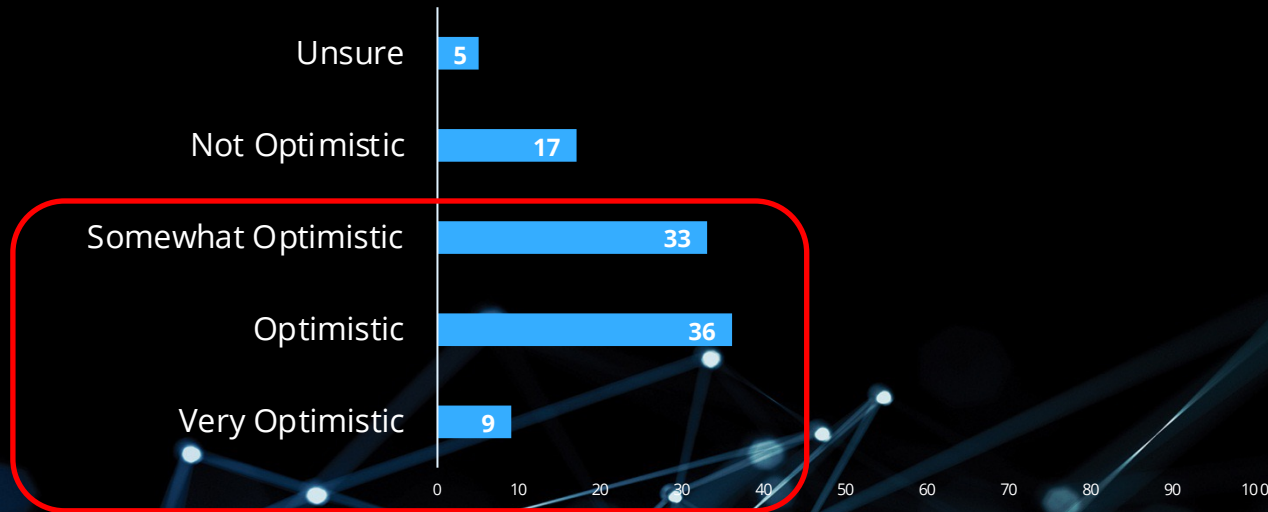
CONFIDENCE IN COOKIE-LESS PREPAREDNESS



Will Location Data Survive the Cookie Apocalypse?

42% of Respondents are more than “somewhat” optimistic

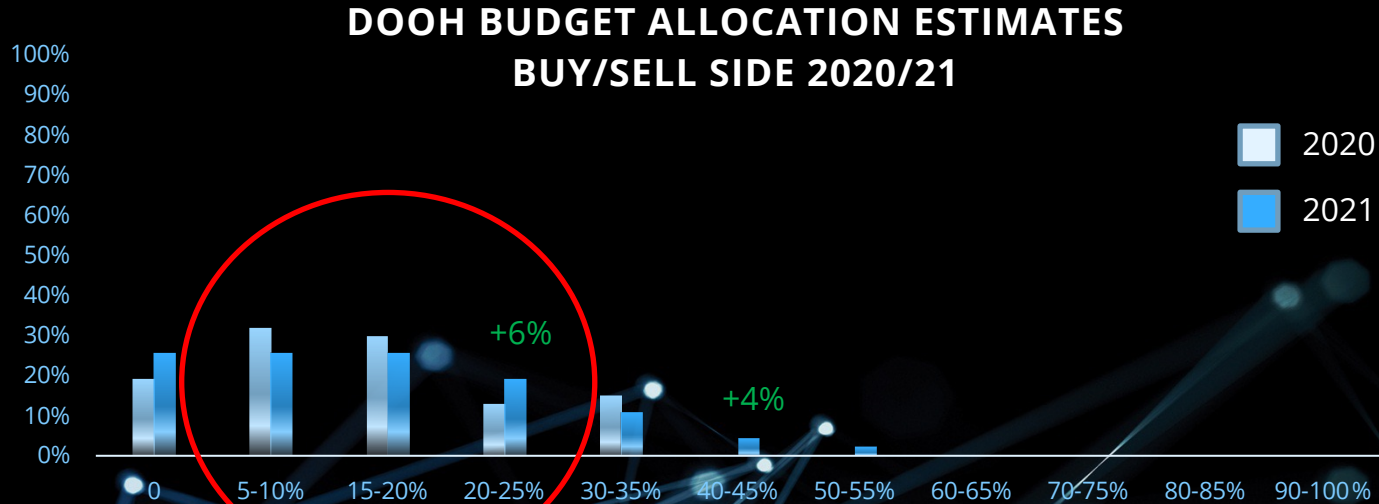
Will Location Data Remain Available to Address Audiences Post Cookies



Q: Are you optimistic that location data will continue to serve as an available currency for reaching addressable audiences in a cookie-less world?

Est. DOOH Budget Allocation – 2021 Compared to 2020

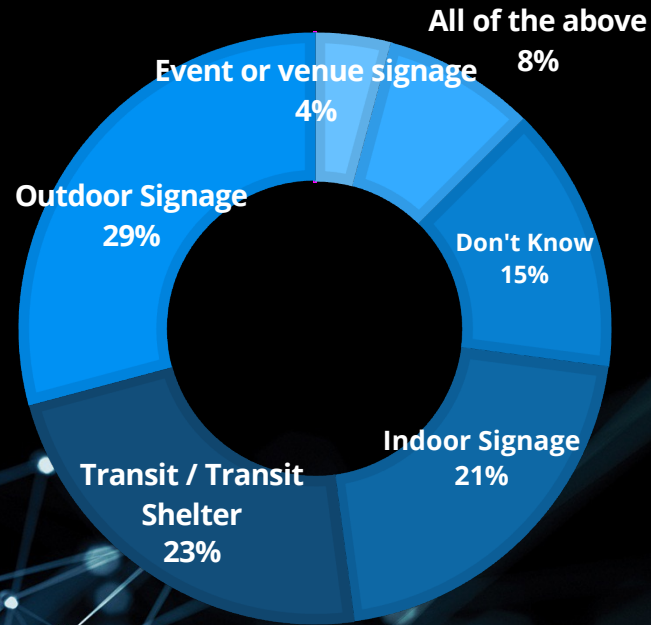
Some reduced allocations with some signs of optimism – 45% est. between 15-25% of media budgets towards DOOH



Q: When developing a media plan, what percent of the budget is/was allocated to DOOH? 2020 Compared to 2021

What Type of Signage is Being Purchased?

29% of DOOH expenditure is being allocated to Outdoor followed by Transit/Shelter (23%) and Indoor (21%).



Most Important Factors When Buying DOOH?

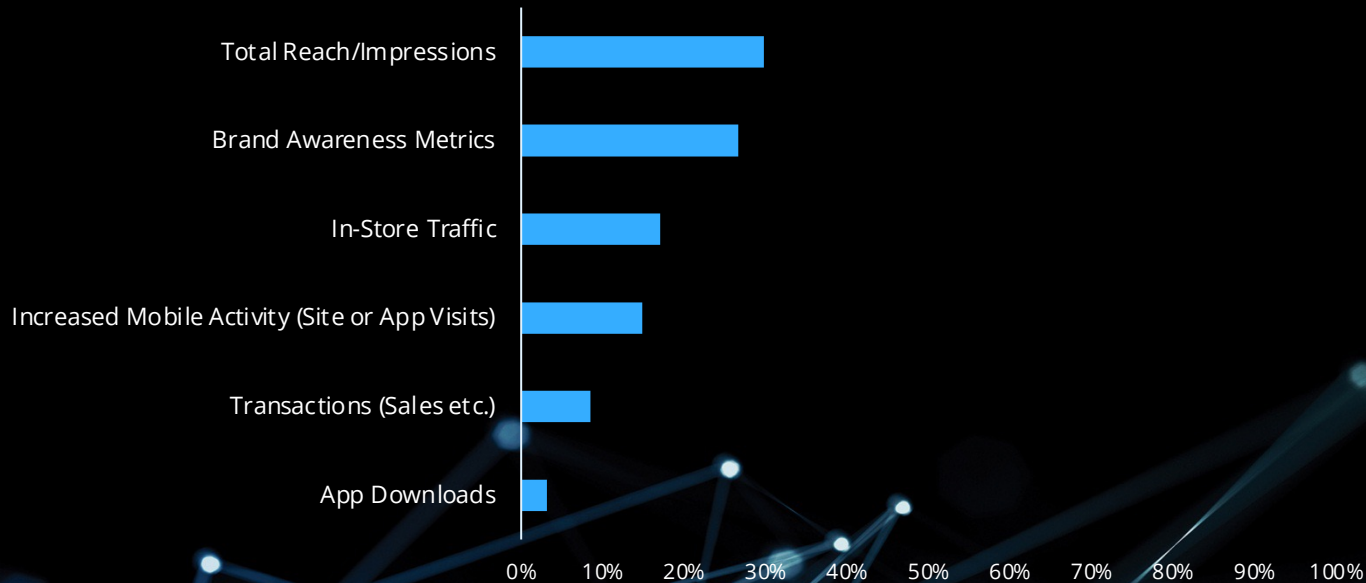
Access to data & strategic alignment key attributes to buying DOOH



Q: When buying DOOH media, which of the following was/is the single most important factor when choosing to invest (select one)?

Measuring DOOH Success

Reach is King



Q: When buying DOOH media, which of the following was/is the single most important factor when choosing to invest (select one)?

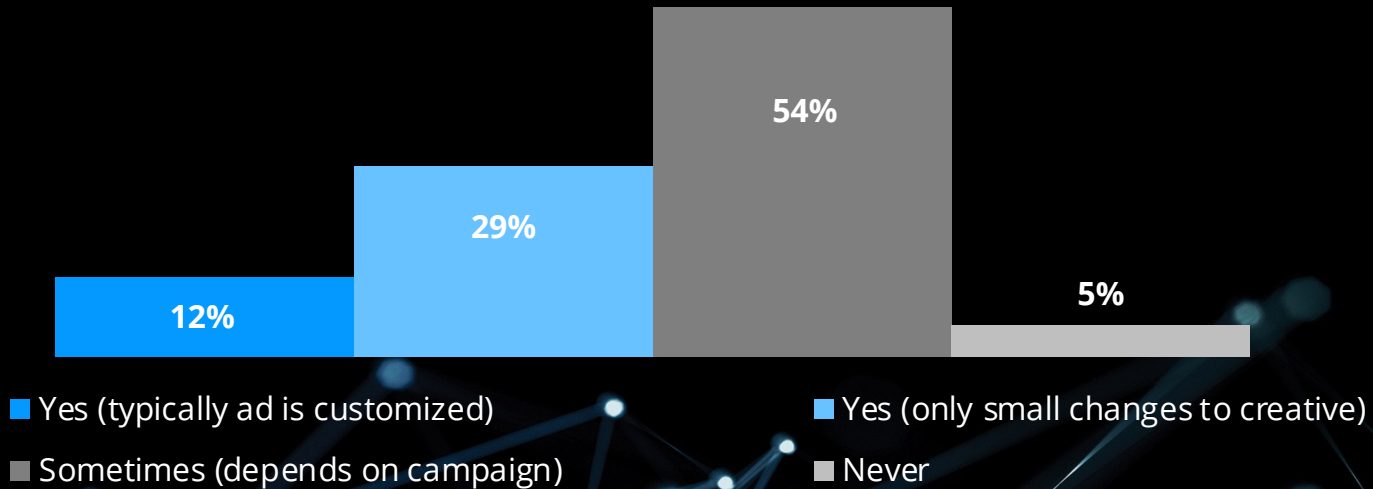
Location Data in Action

Tremendous untapped opportunities to leverage LB data

Use of Location Data	Essential	Use Regularly	Use Sometimes	Never Use
Geo-Targeting to reach audiences in specific locations	41.51%	35.85%	13.21%	9.43%
Understand our audience demographics (overlying Environics or other data)	26.42%	45.28%	15.09%	13.21%
Geo-Fencing to understand audiences within a certain area	26.42%	41.51%	22.64%	9.43%
Enhance Digital Out of Home Placements	20.75%	30.19%	20.75%	28.30%
Measure foot traffic from online media campaigns	20.75%	26.42%	28.30%	24.53%
Conquest from competing stores/services	16.98%	20.75%	26.42%	35.85%
Inform creative messaging	9.43%	26.42%	39.62%	24.53%

Is the Buy-Side Leveraging Dynamic Ad Insertions ?

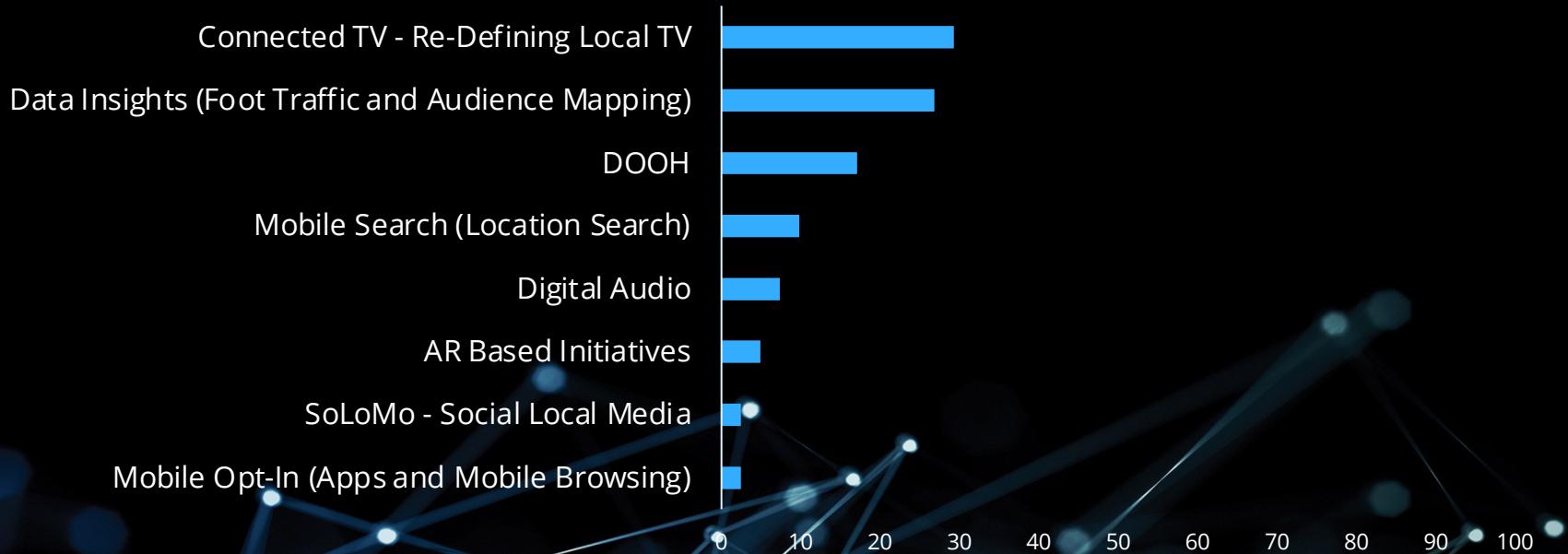
Less than half (41%) of the buy-side is leveraging DAI - Opportunity to grow



Q: Location based advertising allows brands to tailor their creative messaging to the location the ad is being seen (weather, closest store location, neighborhood identifiers, etc.). Do your clients take advantage of this?

Connected TV Holds the Greatest Promise for LBA

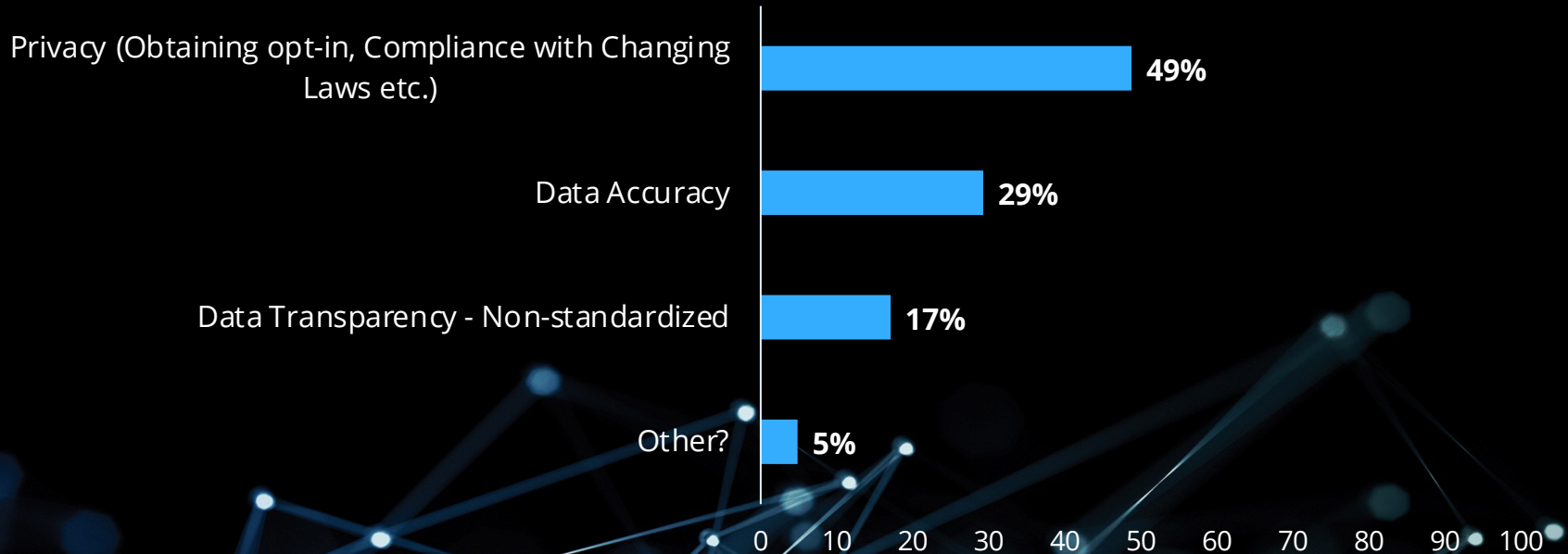
Getting hyper-local with TV holds great promise – Advanced insights and DOOH follow



Q: Which of the Following Location Based advertising tactics holds the most promise for you?

What Challenge Lies Ahead?

Almost half (49%) of respondents are concerned about obtaining opt-in consent and compliance with evolving laws



Q: When it comes to the future of Location Based Advertising, what in your opinion, is the biggest challenge?

The Next Big Thing

Predictive metrics, better data and measurement – all in the cards.



Summary of Findings

Location Based Advertising holds promise and untapped opportunities

- Some **uncertainty on Cookie Independence** and the reliance of location based data into the future
- Industry is **somewhat optimistic about location data surviving the cookie apocalypse**
- Estimated average budget allocations for DOOH hovering at around **15-25%** - some optimism in 2021 (Covid recovery)
- 1/3 of investment appears to be against **Outdoor signage**
- Data/Insights and strategic placement (alignment) are top purchase drivers but **reach is the top success metric**
- A lot of untapped opportunity to leverage location data for **advanced purposes beyond geo-targeting** – it's still in its infancy
- **Connected TV** cited as a major growth opportunity for Location Data
- **Privacy** – Opt-in is top concern/barrier in 2021

Thank you for Supporting IAB Canada

Powerful Digital Leadership