



# IAB Canada

*Barometer Report:*

## The State of Digital OOH Advertising in Canada 2018

Member Survey Results

May 1, 2018

# 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. In today's mobile world, the OOH channel is starting to deliver traffic to advertisers through smart data management.

## Purpose

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

## Methodology

- 15 Minute Survey questionnaire, sent to IAB Canada member database;
- Perceptions based on "past year" and future expectations;
- Sample composition: 67% 'buy-side' + 24% 'sell-side' = 91% of total
- In field April 3-16, 2018;
- Respondent identity and answers confidential, results reported in aggregate only.

# Just to be clear, here's what 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.

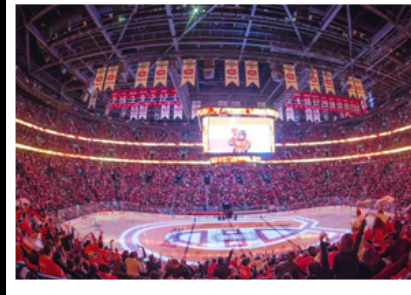
Illuminated from within by a matrix of LEDs, DOOH screens are capable of displaying several full-colour messages in rotation, including fixed or moving video and special transition effects.

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

Indoor DOOH examples



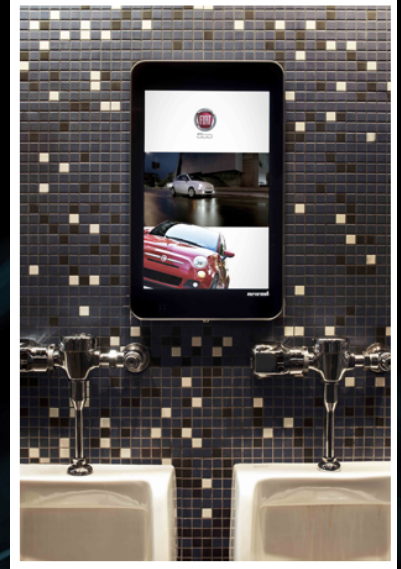
Venue DOOH signage



Transit DOOH example



Outdoor DOOH example



# Survey Highlights

---

**A powerful channel with lots of upside!**

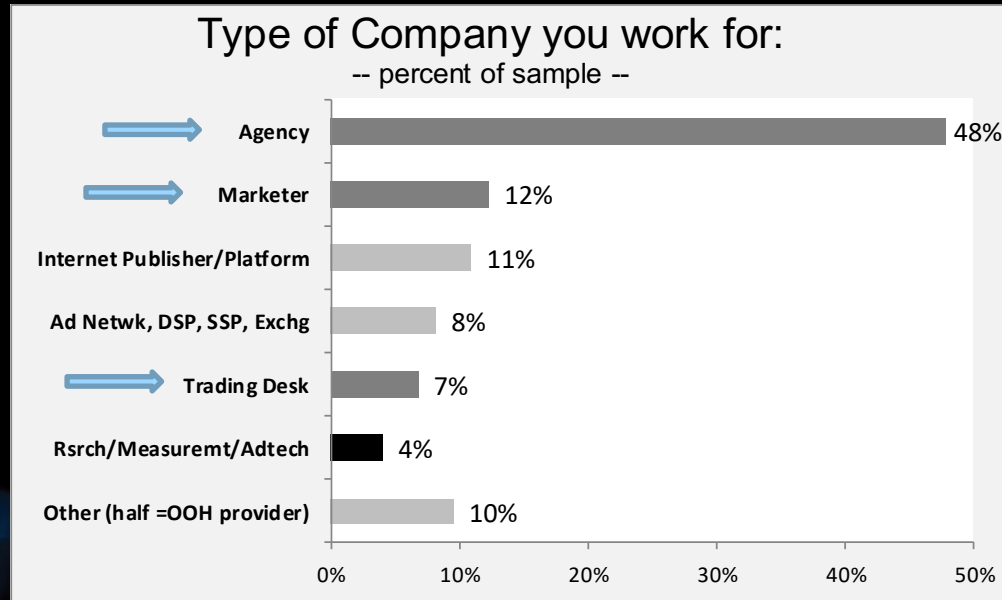
- **Budgets stable or growing.**
- **Top usage drivers – Reach and Impact in Right Places anytime**
- **Barriers to adoption – Comparable Data, ROI Validation**
- **Future Adoption Drivers –Above PLUS Attribution of Mobile Visits with DOOH Proximity**

# Who participated

Powerful Digital Leadership

# Two-thirds 'buy-side', one quarter 'sell-side'

Over nine-in-ten respondents work in the buy or sell-side of the digital and OOH media marketplace.



Over 60% key influencers / final decisioners, 75% involved

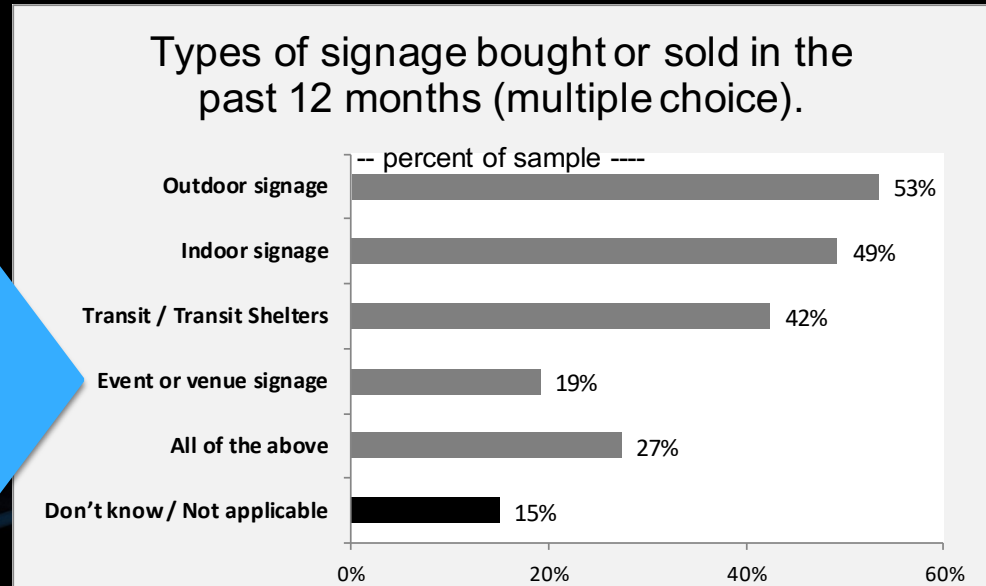
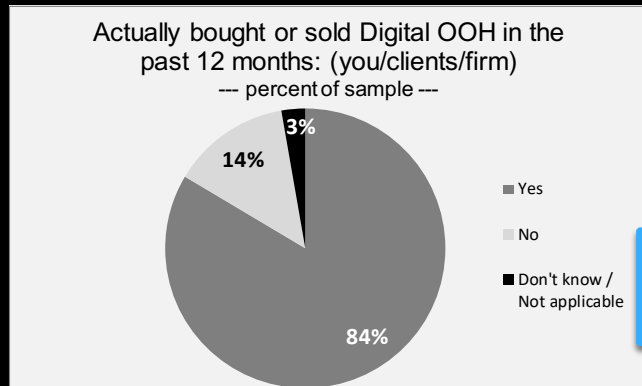
*Consistent with 2017 survey*

# Experience with Digital OOH

Powerful Digital Leadership

# Most have actually bought or sold Digital OOH

Indoor and Outdoor signage are the most commonly used.



Sum exceeds 100 as multiple answers were permitted.

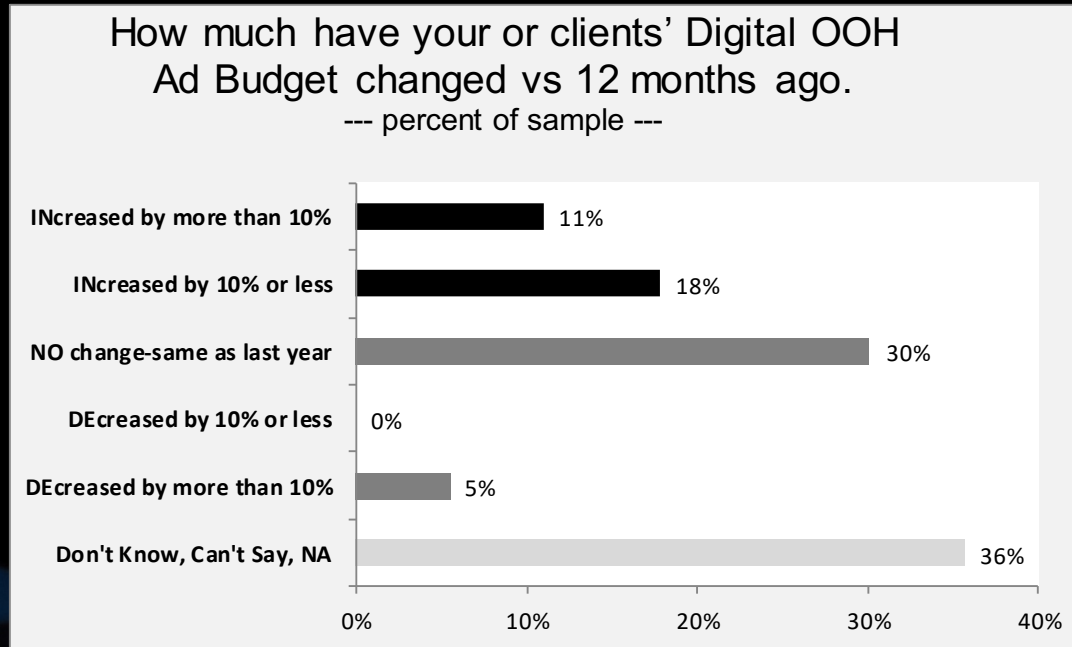


# Spend trend

Powerful Digital Leadership

# On balance, things look upbeat this year

Almost 60% equally split between 'Increases or No change.' Almost no decrease claims from LY.



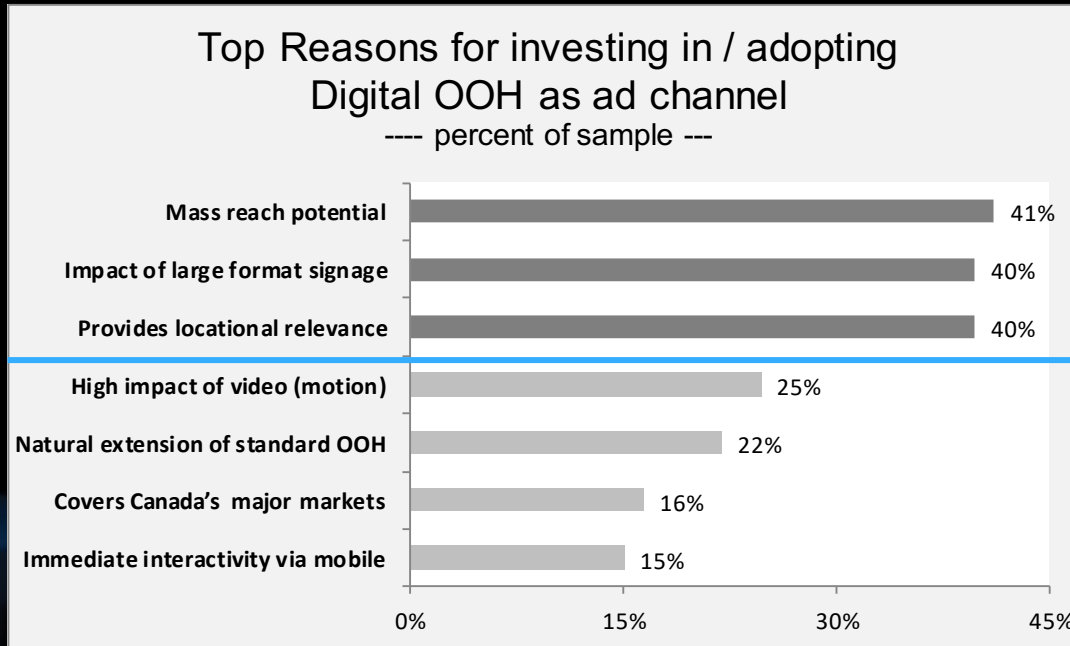
**New question, no trending available**

# Opportunities vs Obstacles

Powerful Digital Leadership

# Top Usage Drivers – Reach & Impact, Right Time & Places

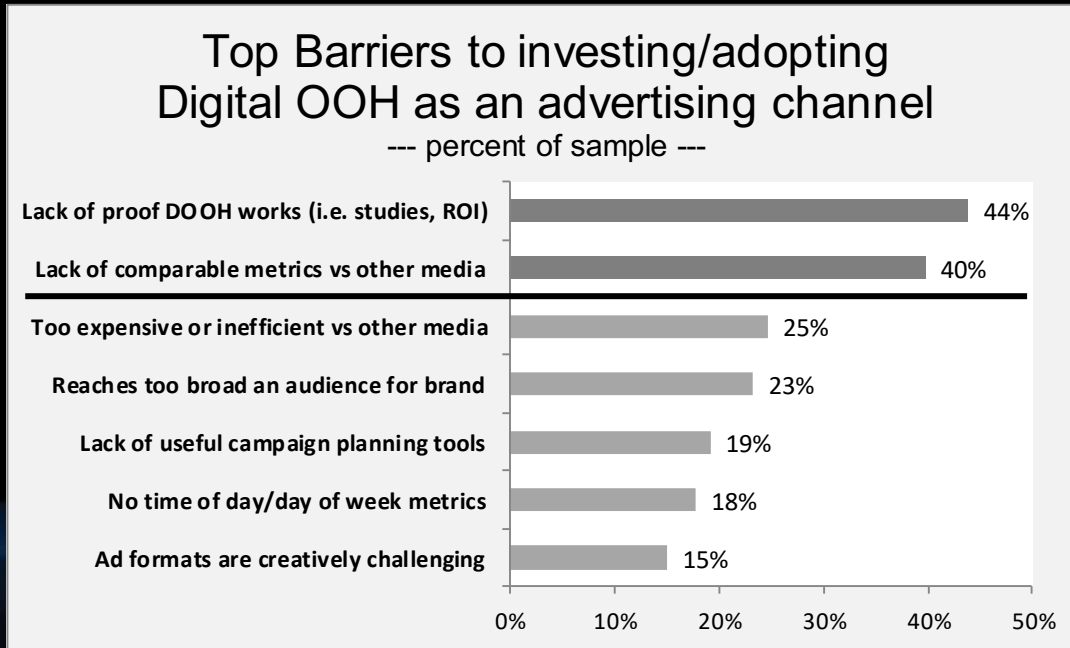
Other reasons include Video capability and allowing mobile interactivity.



*Consistent with 2017 survey*

# Barriers to adoption – Data & Validation

Cost and mass reach are also cited as inhibitors.

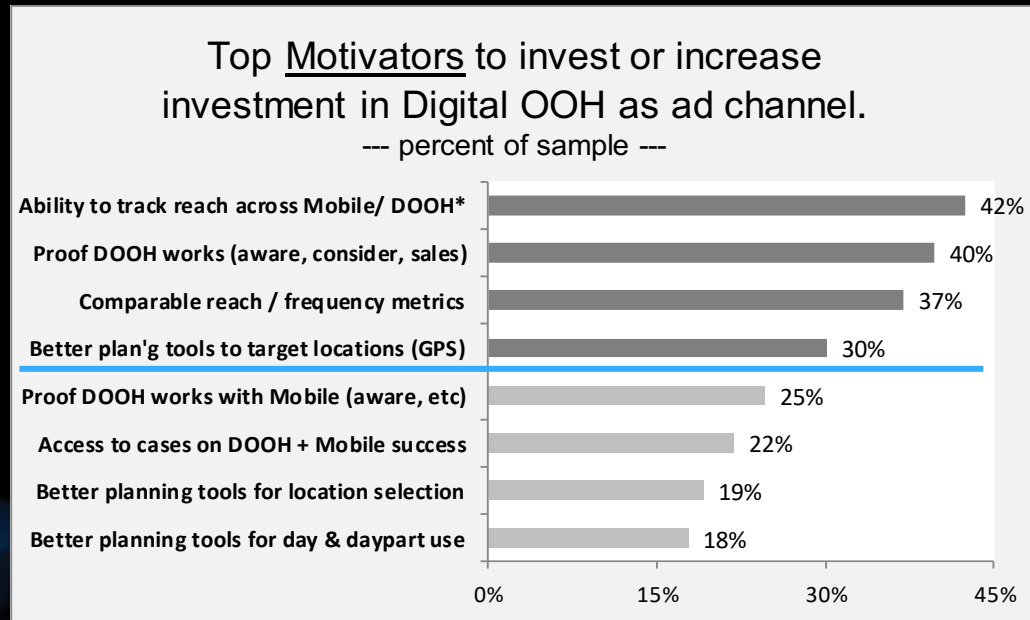


*“No trust built yet that the technology can deliver what’s promised. DOOH vendors are contradicting each other. Need to build trust in this marketplace”.*

Consistent with 2017 survey.

# Work needed on Attribution, Validation, Metrics & Tools

Other needs and wants include proof DOOH works with Mobile.



\*for attribution purposes: i.e. beacons, virtual beacons, motion sensors, eye-tracking

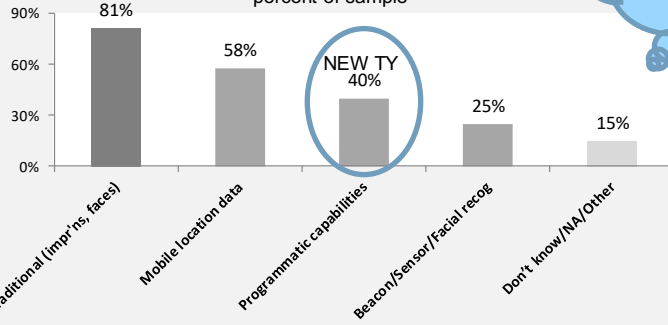
*"Adequate metrics by an official entity with proper methodology. Traffic numbers provided by property owner are not a proper metric source".*

Consistent with 2017 survey.

# Emergence of Programmatic transactions since last survey:

Kinds of Data or Technology used  
CURRENTLY to plan, execute or sell DOOH

--- percent of sample ---



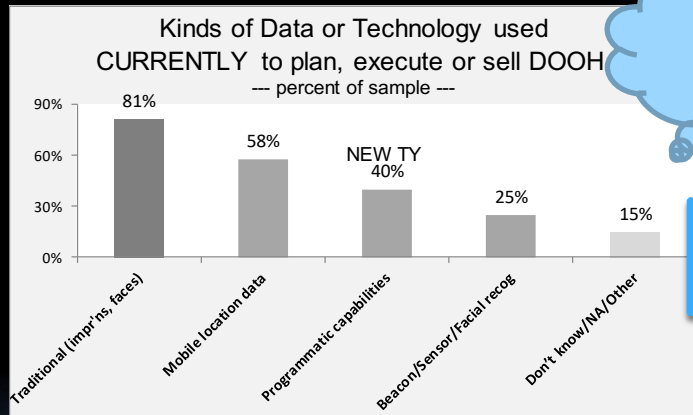
"Environics &  
Other  
research  
tools"

'Programmatic' new in this survey.

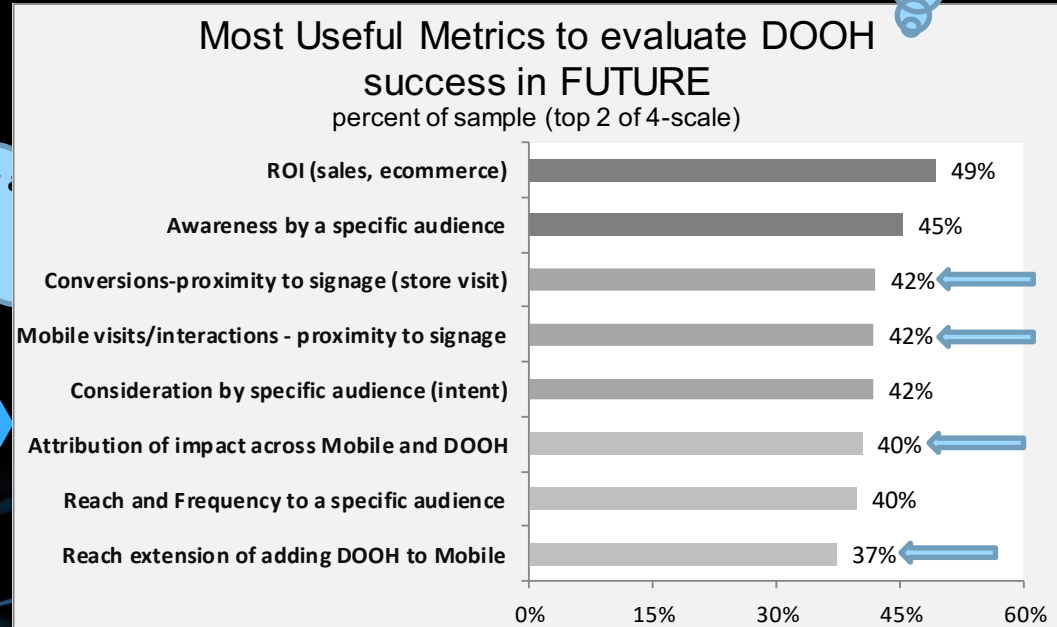
# Future drivers include... Attribution of Mobile Visits /Interactions with DOOH Proximity

A desire to replace traditional measures (CPM, impressions, faces) with ROI, conversions, cross-platform reach extension.

"We should be able to assign conversions. Currently no way to prove proximity was the trigger for site visits".



"Enviroics & Other research tools"



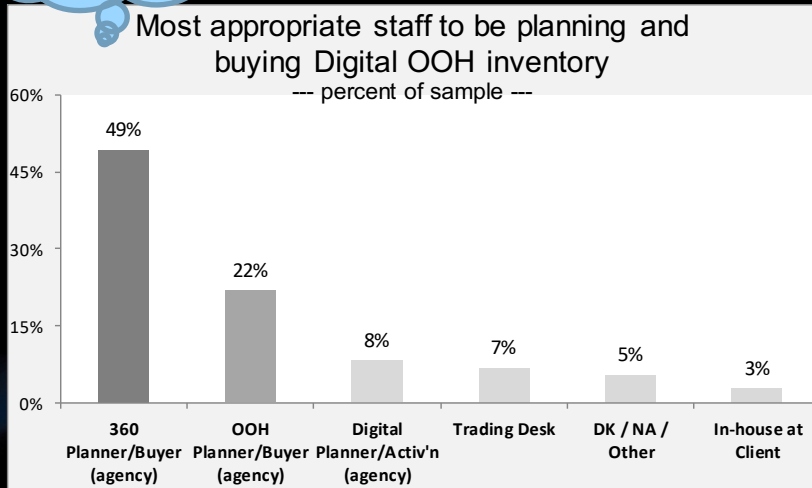
Consistent with 2017 findings





# Half want DOOH handled by Integrated 360 Planner/Buyers

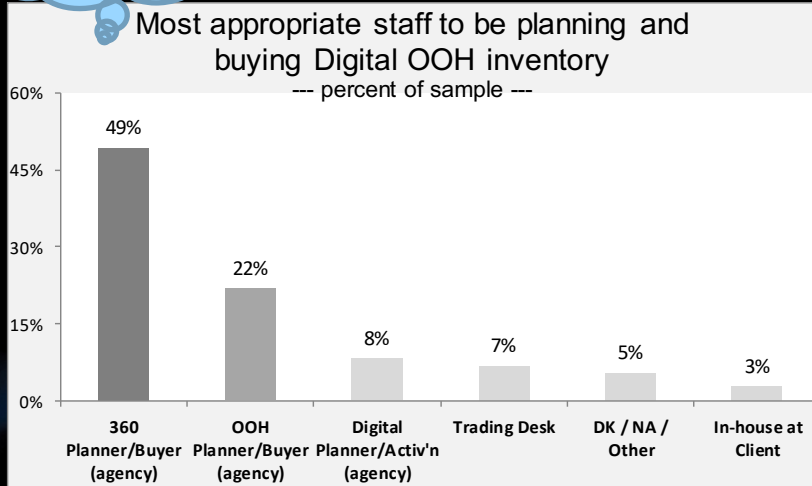
“360 to plan,  
trade desk to  
buy”



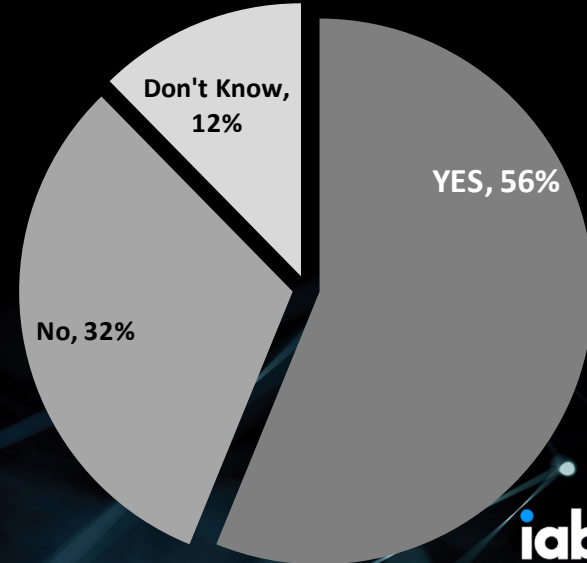
# The Quest for Knowledge – our community wants training.

More than half want additional training, similar to last year.

“360 to plan,  
trade desk to  
buy”



Interest in more Training on planning, buying or selling DOOH, applying mobile location data.  
--- percent of sample ---



Consistent with 2017 findings.

# Summary

---

A powerful channel with lots of upside!

- **Budgets stable or growing.**
- **Top usage drivers – Reach and Impact in Right Places anytime**
- **Barriers to adoption – Comparable Data, ROI Validation**
- **Future Adoption Drivers –Above PLUS Attribution of Mobile Visits with DOOH Proximity**
- **Training is needed**

# Thank you for Supporting IAB Canada

Powerful Digital Leadership