



Digital Out-of-Home Everything

2018/19 US Media Decision-Maker Survey

Report on Findings

Jay Mattlin, JAM Research LLC
Consultant to DPAA
June 2019

BACKGROUND

This is a report on the DPAA's ninth study of US agency planners' and strategists' awareness, usage and perceptions of digital out-of-home (DOOH) media. It follows the survey of Canadian planners and strategists earlier in the year. This ongoing research program obtains insights from advertising's budget planners in order to develop sales and marketing strategies for our industry and our individual member companies.

EXECUTIVE SUMMARY

DOOH is building on its momentum, with increases in the planning of growth, awareness and interest in programmatic options, planning of DOOH mobile together, and a strong and growing tendency to plan for the medium's expenditures earlier in the process.

Well over a third of the surveyed planners expect to recommend increases in DOOH spending, and they collectively believe that a fair and equitable share for DOOH would be at least one out of every five advertising dollars. While this is certainly higher than the current share of expenditures, it points to an opportunity share that will take the work of the whole ecosystem to achieve. DPAA through studies like these and our marketing efforts throughout the year, continue to lead the industry in these important directions.

Underlying this momentum are a set of core assets and qualities that appeal to niches within the advertising agency community. The core assets identified by the survey are:

- Widespread – and increasing -- recognition of the value of the medium in **targeting both broad and narrow geographies;**
- Widespread – and increasing - acknowledgement of the medium's **ability to connect with consumers along their purchasing journeys;**
- Sweeping enthusiasm for mobile, and ways of **connecting DOOH and mobile.**

Qualities of the medium that appeal to segments of media decision-makers include its ability to target consumers at points of contextual relevance; efficiency in creative execution and distribution for certain campaigns; ability to reach relevant targets; flexibility, with respect to both geography and creative execution; non-geographic targeting capabilities; and the impact that can be delivered due size, locations, and use of video.

DPAA and its members can capitalize on the medium's by pressuring DSPs to include DOOH options, and working with partners to deploy new measurement technologies, particularly those that exploit the connection to mobile.

Areas that will lead to growth: decision-makers are asking for various kinds of data that would fuel their interest in the medium:

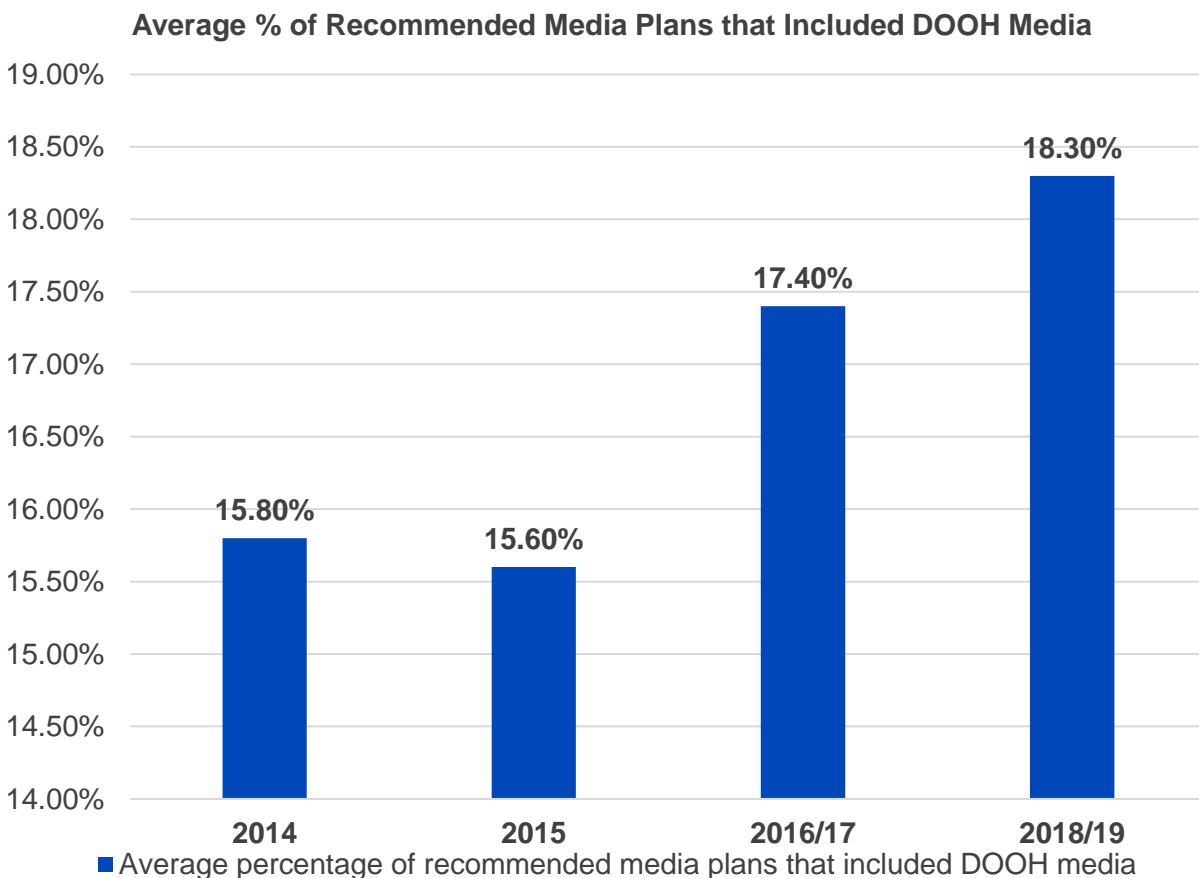
- Studies that demonstrate the incremental impact of DOOH on key **business outcomes** (i.e., ROI) through such tools as **attribution** and marketing mix modeling;
- The availability and quality of targeting and audience **data;**
- **Databases** of DOOH inventory via technology platforms to ease with automation.

The following are the detailed findings from the report...

DETAILED FINDINGS

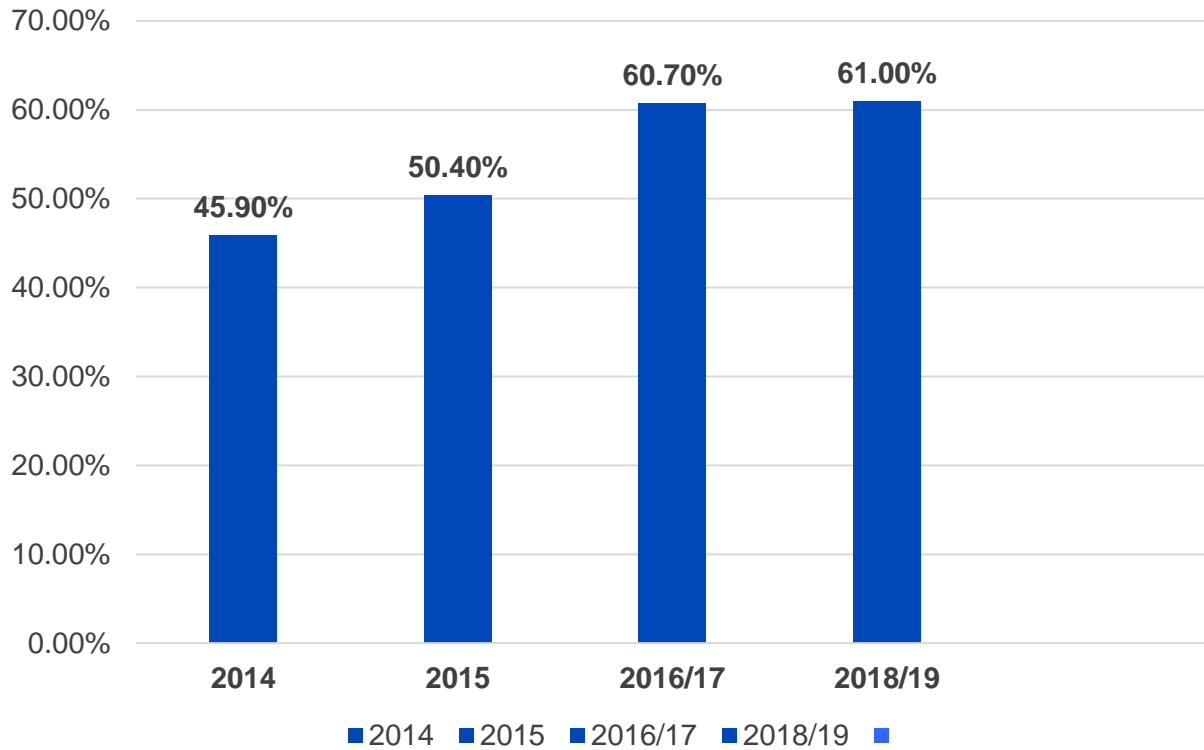
The Status of DOOH

The results of the survey reflect the continued and growing strength of the medium. *More respondents are including DOOH media on their plans and more of those plans on average with DOOH in them are getting approved.* The percentage of surveyed planners and strategists who had included DOOH in their recommended media plans has maintained growth and continued to be high. More encouraging, the percentage of respondents at Director-level and above who recommended DOOH rose from 69% to 79%. This may be related to agency turnover at the lower levels of planning teams, combined with increased stability at the higher level.



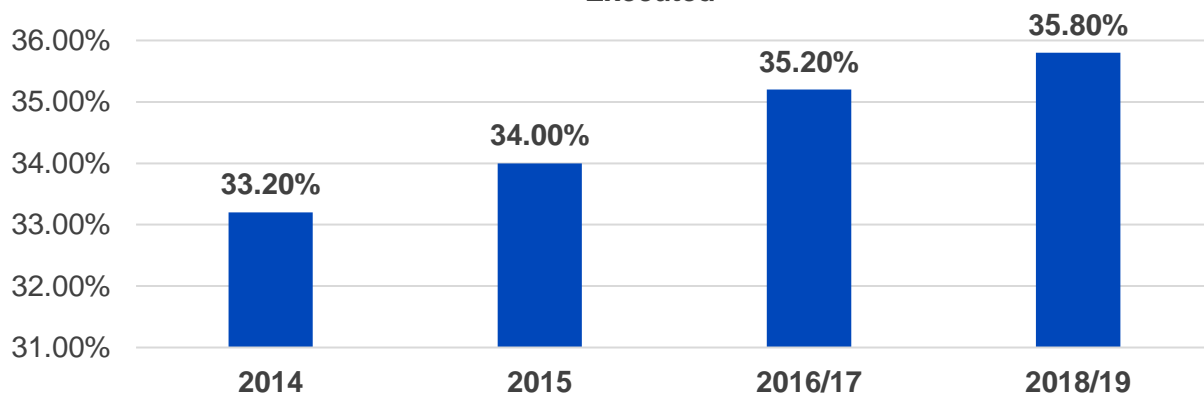
What percentage of your recommended media plans included DOOH media?
Base: Those whose recommended plans that included DOOH Media,

% Who Included DOOH Media in their Recommended Media Plans in the Prior 12 Months



Did your recommended media plans include any Digital Out-of-Home (DOOH) media in the last 12 months?

Average % of Plans Including DOOH Media that Were Approved and Executed



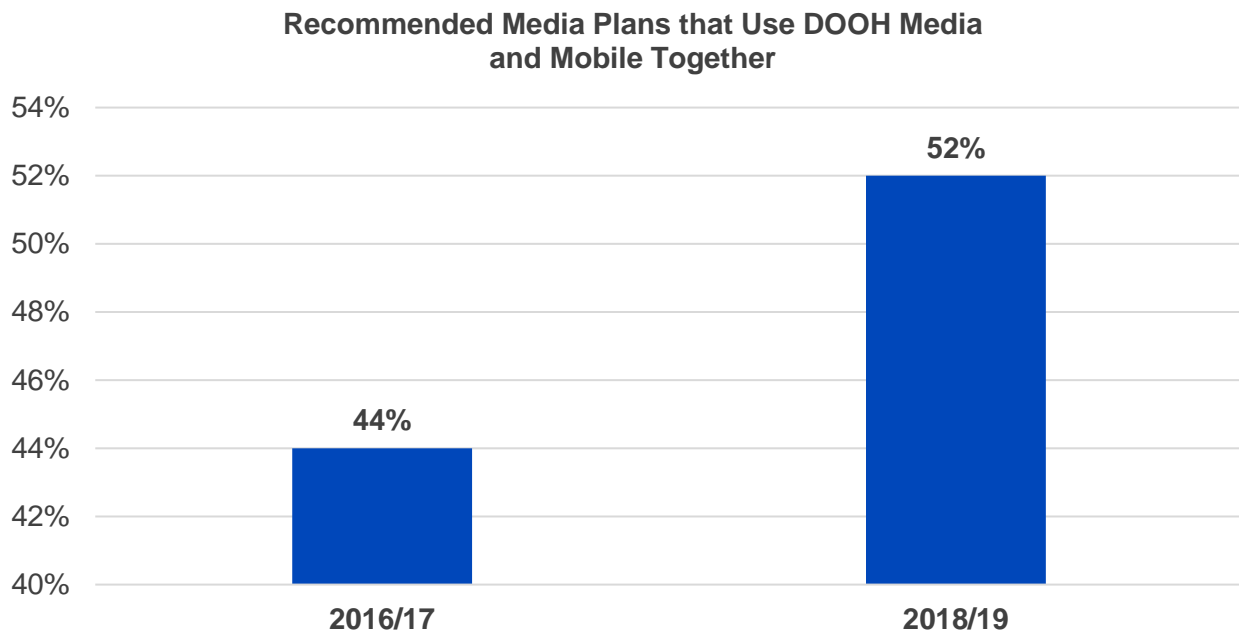
■ Average percentage of plans including DOOH media that were approved and executed

What percentage of your recommended media plans including DOOH media were approved and executed?

Other signs of growth for DOOH media include . . .

- **Growth** in the **planning of DOOH media and mobile together**;
- **Growing awareness** of the **ability to buy DOOH programmatically**;
- The tendency to **consider DOOH early in the planning process**; and
- Planners’ perceptions of DOOH media’s appropriate share of marketing dollars.

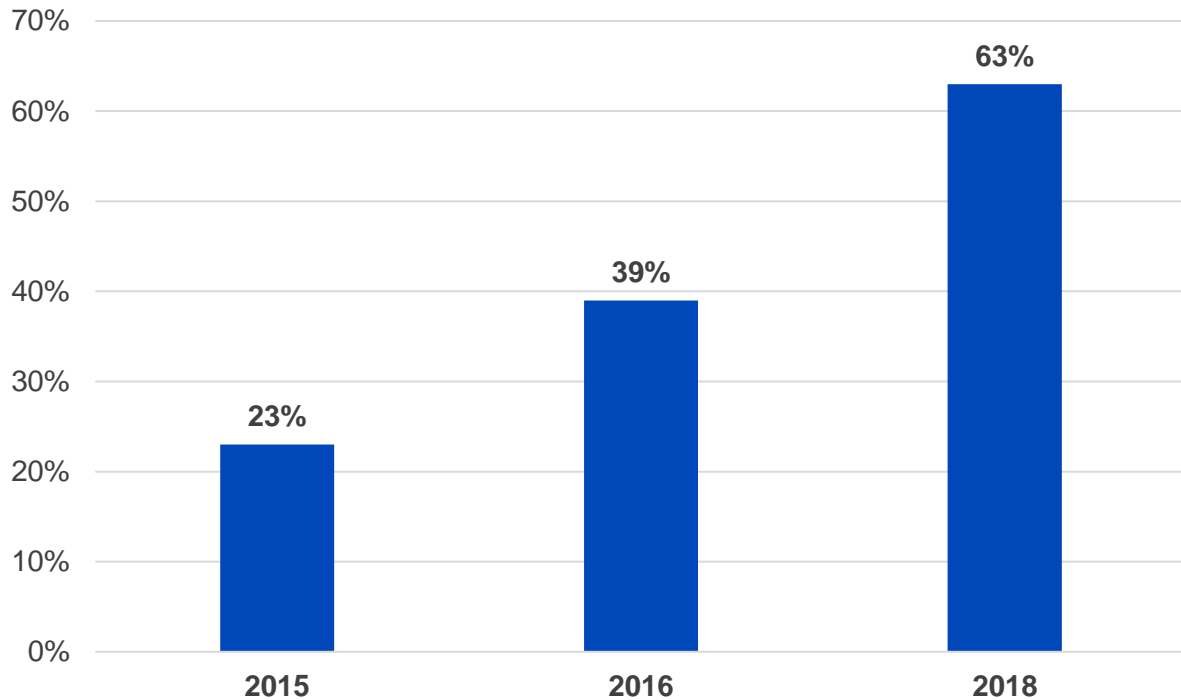
Just over half (52%) of the surveyed planners & strategists said they had recommended media plans that combined DOOH media and mobile – an eight percentage-point increase since 2016.



Have you ever recommended media plans that used DOOH media and mobile together?

Almost two thirds (63%) claim to be aware that DOOH can be bought programmatically, a dramatic increase of 24 percentage points in just two years (see chart below). ***The level of awareness of the ability to buy DOOH programmatically has nearly tripled since 2015.***

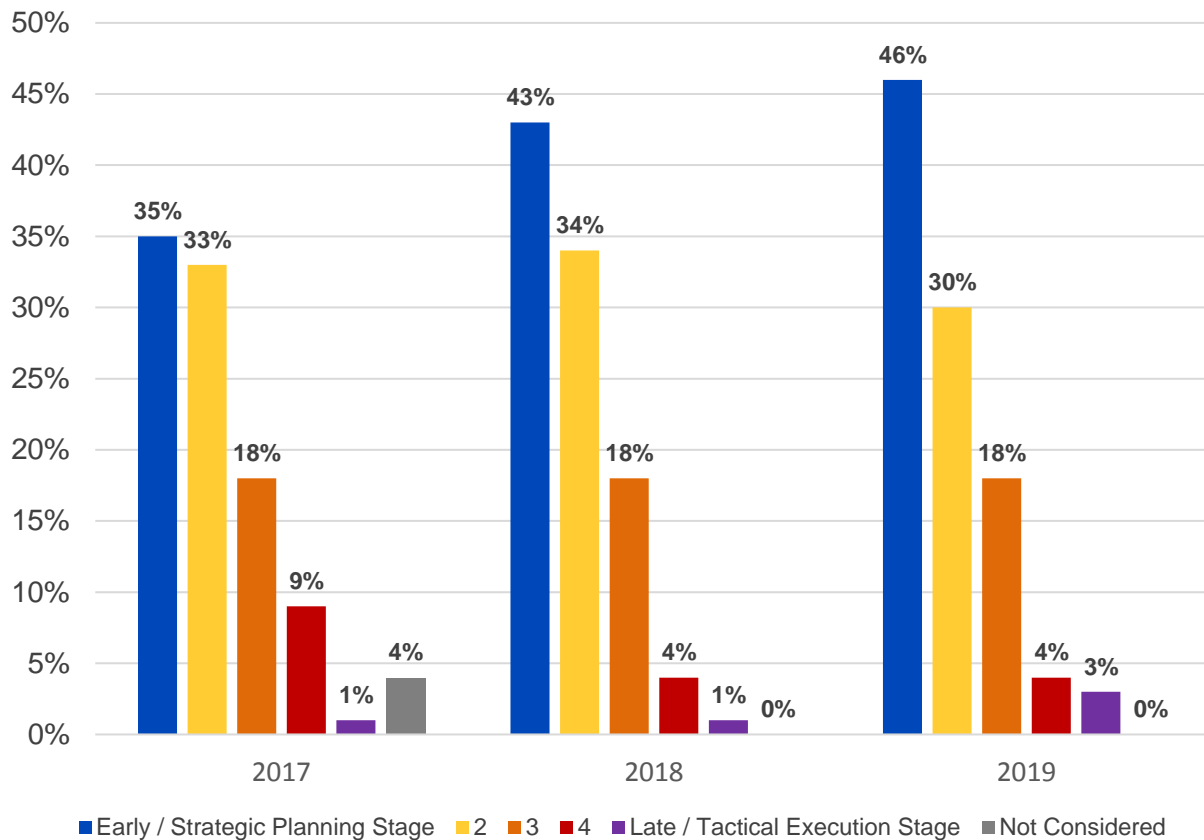
Awareness That DOOH Can Be Bought Programmatically



Are you aware that DOOH media can be bought programmatically?

As befits a mainstream medium, those who have recommended DOOH consider it relatively early in the planning process. **Over three-quarters (77%) of the DOOH recommenders said that they considered DOOH at the earliest or next-earliest stage** (Points 1 or 2 on a 5-point scale; see chart below). Moreover, the percentage who said that they had considered DOOH at the earliest stage, **38%, is eight percentage points higher than the percentage who said that they had considered DOOH in the earliest stage of their prior year’s plans.**

Stage of Communications Planning Process at Which DOOH Media is Typically Considered / Will be Considered next year

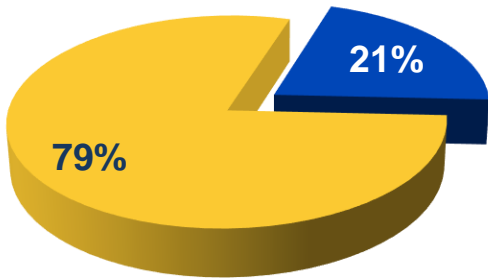


In these media plans, at what stage in the communications planning process were DOOH media typically considered for inclusion in the plan this year and next year? Please use any of the five points in the scale below where 1=Early/Strategic Planning Stage and 5=Late/Tactical Execution Stage.

Finally, in this year’s survey, for the first time, the DPAA asked respondents what they believed to be “a fair and equitable share for out-of-home in general, including DOOH” both today and in two years. **The average share that the respondents believe is “fair and equitable” for OOH media in general is 20.7% -- multiple times more than the actual proportion allocated for this medium.** And the average share the respondents believe would be “fair and equitable” in two years was 24.4%, just under one quarter. (See pie charts at the top of the following page.) The representatives of the agency community polled in this survey thought that out-of-home media would, on average, merit nearly one out of four advertising dollars in two years. These figures serve as indications that the out-of-home medium is valued in the agency community to a greater extent than its market share alone would suggest.¹ Once again reflecting an opportunity for the industry.

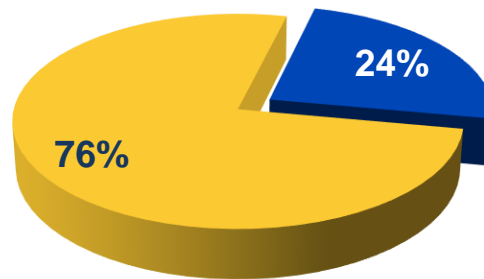
¹ These results need to be considered directional in nature, because the survey question asked only about OOH media and not all of other media that compete for advertising dollars.

Fair and Equitable Share for OOH today (average)



■ OOH ■ All Other Media

Fair and Equitable Share for OOH in 2 years (average)



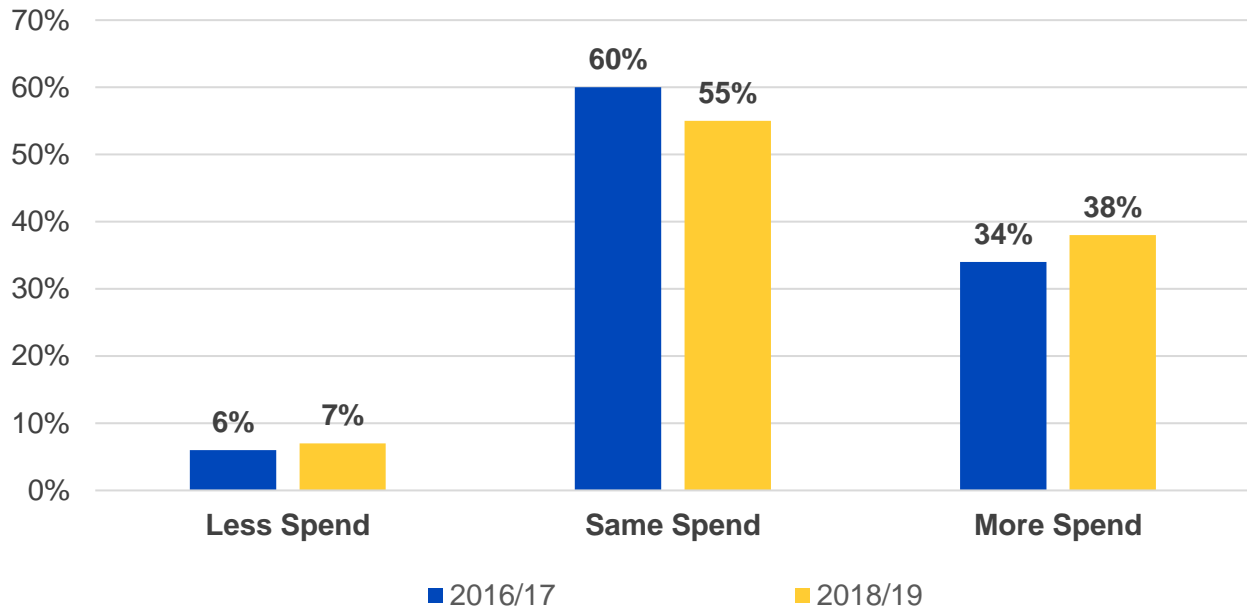
■ OOH ■ All Other Media

Across all of your clients' advertising budgets, what, on average, do you believe is a fair and equitable share for out-of-home in general, including DOOH, today and next year?

Outlook for the Future

The **outlook for growth** in DOOH media in the US continues to be **positive**. Thirty-eight percent of the surveyed decision-makers expect to **recommend more spending** on DOOH in the next two years, **more than five times the percentage who expect to recommend less spending**. (See chart at the top of the following page.) Decision-makers' perceptions of the industry's growth prospects have brightened slightly since 2016/17: The percentage expecting to recommend an increase in DOOH spending rose four percentage points since 2016/17.

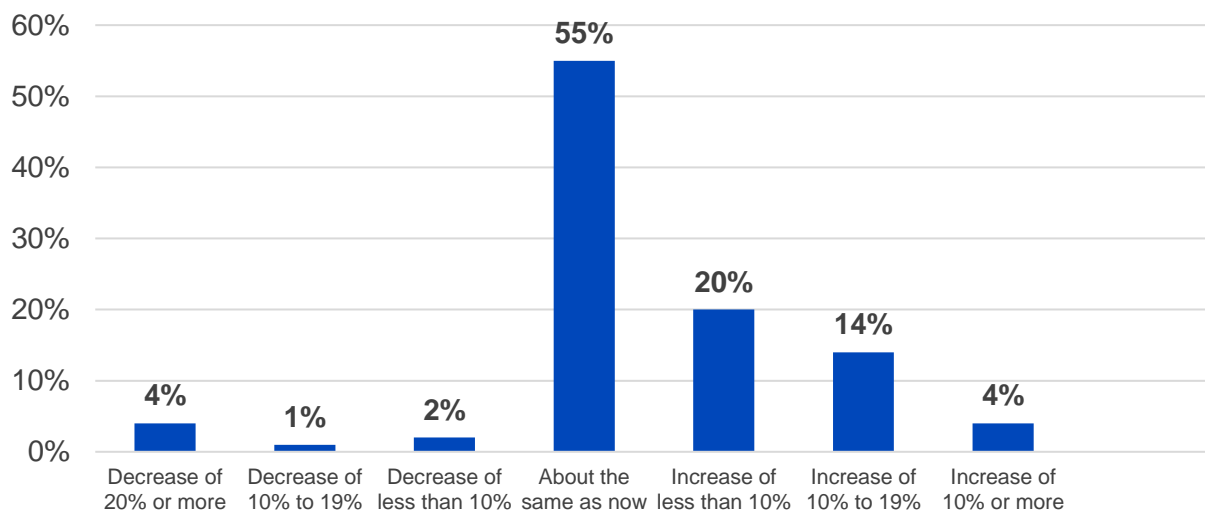
Expect to Recommend for DOOH Spending Over Next Two Years



Over the next two years, do you expect to recommend an increase or decrease in spending on DOOH?

A detailed breakdown of the planners’ and strategists’ 2018/19 projections of their recommendations over the next two years appears below. This indicates the need for more marketing and education, especially against new planners.

Expect to Recommend for DOOH Spending Over Next Two Years



Over the next two years, do you expect to recommend an increase or decrease in spending on DOOH?

Sources of Strength

The key sources of the DOOH medium’s inherent strength most widely perceived by US media decision-makers, as identified in the survey results, are:

- Its unique ability to **target by broader geographies as well as narrower, specific locations;**
- Its unique ability to deliver messages during points of consumers’ **purchase journeys;**
- Its **connection to** the increasingly-powerful **mobile** platform.
- Value as part of increasingly important **omnichannel strategies**

Each of these has grown in importance since 2016/17 and can be promoted by the industry to gain more attention in the advertising community. In addition, there are several other sources of strength that are important to segments of that community, which will be covered below.

Reasons Planners/Strategists Support DOOH (Aided)

When those who had recommended DOOH in their media plans were asked to check the reasons that they had included the medium in those plans, their **top two reasons** were the same as they were in 2016 and in 2015 – **geo-targeting** and **connecting with consumers on their paths to purchase**. (See table below.) Both of these reasons have **grown** in importance since 2016/17, with larger percentages checking both of them. These two attributes loom much larger in planners’ and strategists’ thinking than using OOH to complement TV or video buys, or the ability to buy the medium programmatically as a reasoning for inclusion. DOOH appears to be well-positioned to pick up strength as it spreads to more locations and venues and as location targeting possibilities along consumers’ paths to purchase grow. Sales strategies can point to these rationales below as clients are targeted.

Reasons DOOH Media Included in Recommended Plans	2014	2015	2016/17	2018/19
Geo-target by DMA, zip codes or hyper locally	63%	62%	67%	81%
Connect with consumers on the path to purchase	51%	50%	55%	64%
As part of an omni-channel strategy	9%	20%	7%	54%
Target consumers by contextual relevance	41%	32%	30%	38%
Complement TV buy for balanced delivery to light TV viewers	21%	20%	26%	34%
Ability to connect data from DOOH screens & data from mobile phones	9%	11%	17%	33%
Geo-target via mobile location data	NA	NA	31%	32%
Complement an online video buy	15%	16%	22%	30%
Digital delivery allowing for flexibility in lead time/copy changes	9%	10%	19%	28%
Deliver additive audiences to digital plans	NA	NA	NA	22%
Client directive	13%	9%	21%	19%
Integrate naturally with mobile campaign(s)	NA	NA	NA	15%
Extend reach: Areas of country/targets that are difficult to access	NA	NA	NA	14%
Availability of DOOH in your agency's programmatic buying system	NA	NA	7%	11%
Demonstrated effectiveness in driving results for my brand	NA	NA	NA	11%

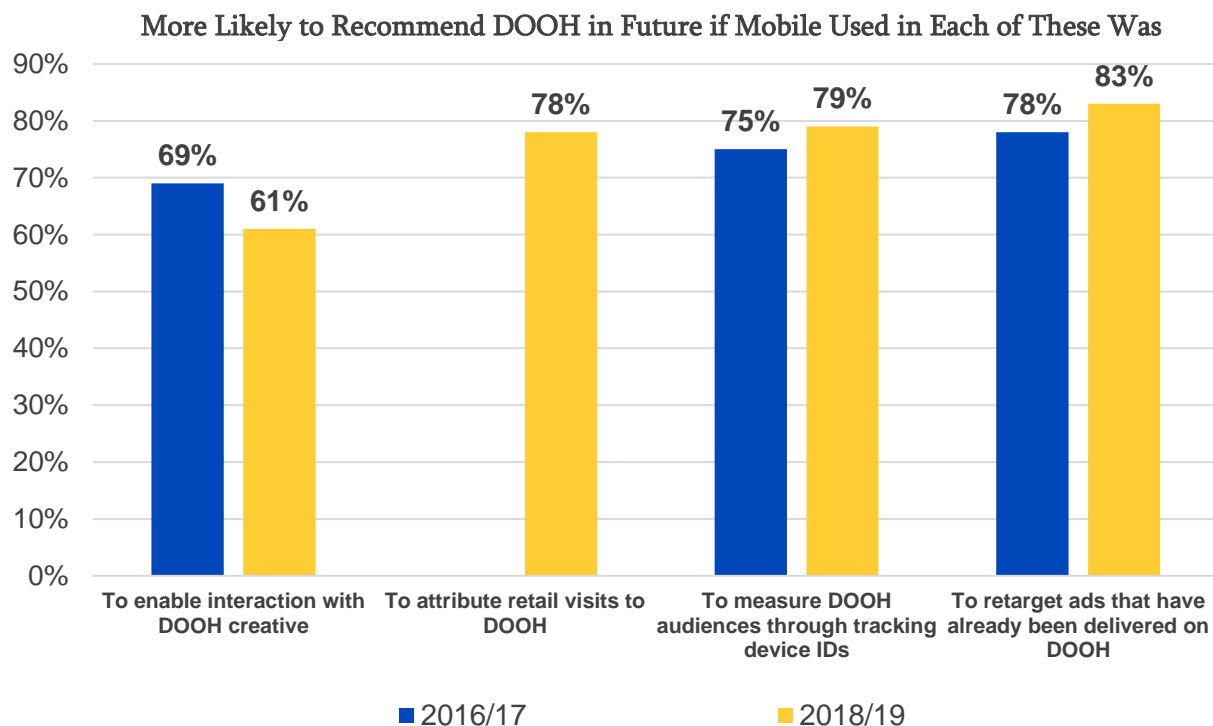
The percentage who checked “Ability to connect data from DOOH screens and data from mobile screens” nearly doubled. As the mobile platform continues to charge ahead as an advertising channel and data source, its connection to DOOH has become essentially important. The importance of this connection is also apparent in the increased usage of mobile and DOOH in combination, referred to earlier.

Aside from geo-targeting and path to purchase, the other reason for choosing DOOH which was cited by a majority of the decision-makers was including it as part of an **“omni-channel strategy.”** In discussions with advertising industry stakeholders, the language used to describe a multi-platform strategy appears to affect attitudes towards that strategy and the place of DOOH within it. An “omni-channel” strategy, apparently resonates more strongly with planners and strategists with than a “video neutral” strategy which makes sense as not all DOOH is perceived as full motion video.

Data in the chart below highlight the **continued benefits to DOOH of aligning with mobile**. As was true in 2016/17, substantial majorities of respondents said that they would be more likely to recommend DOOH in future plans if mobile were used to . . .

- **Retarget ads that have already been delivered to consumers on DOOH screens they have passed;**
- **Measure the audiences of DOOH ads through tracking of phone device IDs;**
- **Enable consumers to interact with DOOH creative.**

The percentages who said that they would be more likely to recommend DOOH for the first two purposes (retargeting DOOH ads on mobile and measuring DOOH audiences with mobile device IDs) both rose between 2016/17 and 2018/19. In addition, over three-quarters said that they were more likely to include DOOH in their plans if mobile were used to attribute retail visits to DOOH.



Would you be more or less likely to recommend DOOH in future media plans if mobile were used in each of the ways listed below?

The rise of mobile has helped DOOH media. The industry can continue to benefit from the association with mobile by continuing to pursue efforts to tie measurement, targeting, and integration of the two media.

Reasons for Supporting DOOH (Unaided)

This year, for the first time, we asked respondents to articulate in their own words the **main reasons** why they chose DOOH for their media plans before they were shown the list of possible reasons. The top-of-mind reasons given by respondents add texture to their thinking about some of the reasons on the list we gave them and highlight the motivations of segments of the agency market in choosing DOOH.

Respondents offered a wide variety of reasons for favoring the medium, as can be seen in the table below. Answers that involved broad geographic targeting and targeting of specific locations were among the most popular, reflecting the pre-eminence of geo-targeting in the list of possible reasons we had given them. Some examples in the location targeting category that illustrate the medium’s ability to reach consumers in particularly meaningful places for a brand:

“Messaging a Gas Credit Card at Gas Stations; Messaging a Travel card at Airports”

“ . . . proximity to store location”

“Proximity to client business locations”

“Targeting High visibility locations.”

The planners/strategists’ **most common response**, cited by 18% of them, involved **lower cost or greater efficiency**. Several years ago, cost emerged as a potential *concern* about DOOH in the survey results; now it is cited by a notable subset of decision-makers as an *advantage* when recommending the medium. These responses tended to emphasize value and efficiency, rather than lower prices. This emphasis on efficiency could be developed into a strong selling point for the medium. A couple of examples:

“To gain efficiencies . . . without needing to produce multiple versions of static creative”

“Allows a variety of environments at efficient costs to really blanket a DMA”

“Ability to buy at scale efficiently.”

The table showing all of the responses given by three or more respondents appears below:

Reasons DOOH Media Included in Recommended Plans (unaided)	
Cost / Efficiency	18%
Reach	17%
Location targeting (specific locations)	15%
Ease of mounting or changing creative	14%
Audience targeting	12%
Flexibility	11%
Geographic targeting (broader geographies)	11%
Impactful	10%
Awareness	7%
Creative considerations	7%
Path to purchase	7%
Supporting / Supplementing other media	6%
Responses given by one or two respondents	21%
What were the main reasons you included DOOH in your recommended media plans? (Open-end) Base: Recommended DOOH media in prior 12 months	

These results and the sample’s responses to the list of closed-ended (aided) reasons for choosing DOOH reveal other sources of strength for the medium among subsets of planners and strategists. These sources include:

- Contextual relevance:** Targeting consumers by contextual relevance (such as personal care products in health clubs or baby food in pediatricians’ offices) is the fourth-most-cited reason in the list for recommending DOOH media (with 38%) in the list we had provided in the questionnaire. It was also mentioned by the respondents who spoke about the right environment for their ads (5%) in the open-end question, with comments such as:

“... relevant environments/audiences”

“Typically it’s the right location. . . . sometimes only digital boards are in the right location.”

For some brands, this would be an appealing positioning for DOOH.

- Complementing other media:** Though complementing TV buys and online video buys are not among the most prominent reasons for including DOOH in media plans, there are circumstances in which planners think of DOOH as complements to other media, beyond just TV and online video. Open-end responses mentioned supplementing radio, static bulletins, and mobile (a telling quotation: “increase frequency without dealing with mobile ad blindness”).

- Reach:** Reach was the second most-often mentioned reason for recommending DOOH (with 17% of those who responded to the open-ended question). While it has typically not been sold as a reach medium, its ability to extend reach appears to be a source of strength for some brands and campaigns. Some examples of the verbatim responses in this category include . . .

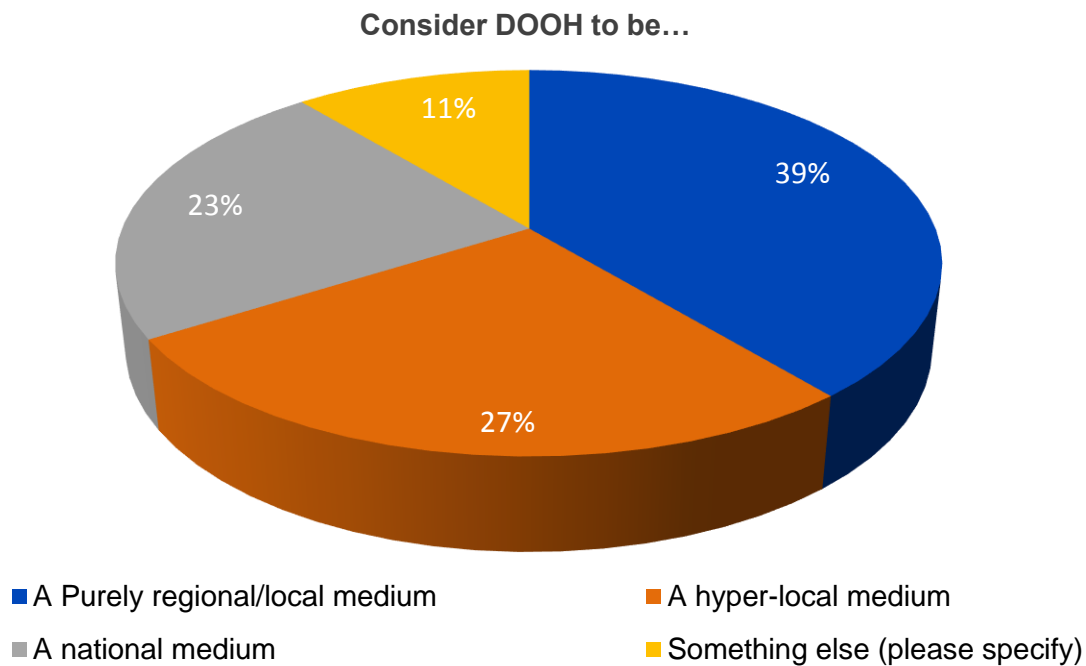
“Broad reach in the markets we are working in.”

“Reach & event extension targeting”

“High visibility and mass reach with target demo”

“additional reach in key markets.”

These comments reflect one of the medium’s core strengths as a powerful tool for geo-targeting across both broad and narrow geographies. As can be seen in the chart below, there is no consensus about whether DOOH is a national, regional, or hyper-local medium and so can be described in whichever way might meet an advertiser’s objectives. Half of those who responded “something else” to this question wrote that it was “all of the above;” another third said that they considered the medium to fall into two of the three categories (national *and* regional or regional *and* hyper-local).



Do you consider DOOH to be a national medium, a purely local/regional medium, a hyper-local medium, or something else?

- **Flexibility:** Half of the 11% who checked “something else” in answering the above question (including some of those who said the medium fit all three categories or two of them) wrote that the category for DOOH “depends.” Their explanations of what the categorization depends on highlight another perceived strength for DOOH – its flexibility:

“depending on the client needs”

“...depending on campaign needs”

“depends on the goal of the campaign.”

“... depending on the goals and how it is executed.”

“Depending on the strategy and coverage . . .”

More specifically:

“ . . . depending on how I want to use it. I use it for national reach but purchasing specific audiences (through programmatic) or hyper-local when purchasing for a specific location”

Another respondent simply said DOOH is

“Whatever you want it to be, customizable.”

In short, the medium can be planned to suit a variety of reach needs and goals in an array of possible geographies, which can be of value to certain clients and brands.

In addition, 11% mentioned “flexibility” as one of the reasons they included DOOH in their media plans. Ease of changing creative, mentioned by 14% of those who answered the open-end question about the main reasons for including DOOH was the fourth-most-often mentioned category of responses to this question. It is therefore advisable for the DOOH industry to continue to press flexibility in both creative delivery and geography as a strength of DOOH.

- Targeting, non-geographic: In addition to geographic targeting and contextual targeting, 12% of those who had recommended DOOH media said they were doing so to target specific, niche audiences that would have been difficult to target through other media. Examples include. . .

“ . . . business executives”

“ . . .car owners, heavy drivers”

“ . . . HCPs and consumers in doctor offices”

“Cinema is used to capture a premium, captive audience on weekends.”

These unique targeting capabilities represent a strength for DOOH media that it would be helpful to note with certain clients.

- Impact: It may seem obvious to those who work in the medium, but it should not be overlooked that some agency decision-makers value the medium for **the impact that it can make on consumers due its visibility, size, ubiquity, or interactivity**. One out of 10 of those who recommended DOOH mentioned the potential impact on consumers – and clients – of creative on DOOH screens as a reason for their recommendation. One respondent referred to this as a **“Wow factor for client.”** Another expressed it as “making a brand feel bigger in a single market during a particular time period.”

In sum, these data suggest that the DOOH industry **can build on its success by promoting DOOH through its recognized strengths** – its capability to target broadly and narrowly with respect geography and with respect to the types of consumers that clients want to reach; its ability to reach customers at critical points on the path to purchase, including points of contextual relevance and at the awareness stage; its potential connection to mobile to bolster measurement and effectiveness; its ability to extend the reach of a message, supplementing other media; the flexibility and efficiency it can offer; and the impact it can have by virtue of the sight, sound, and motion it delivers on large screens or multiple screens in close proximity to each other.

Opportunities for DOOH in the US

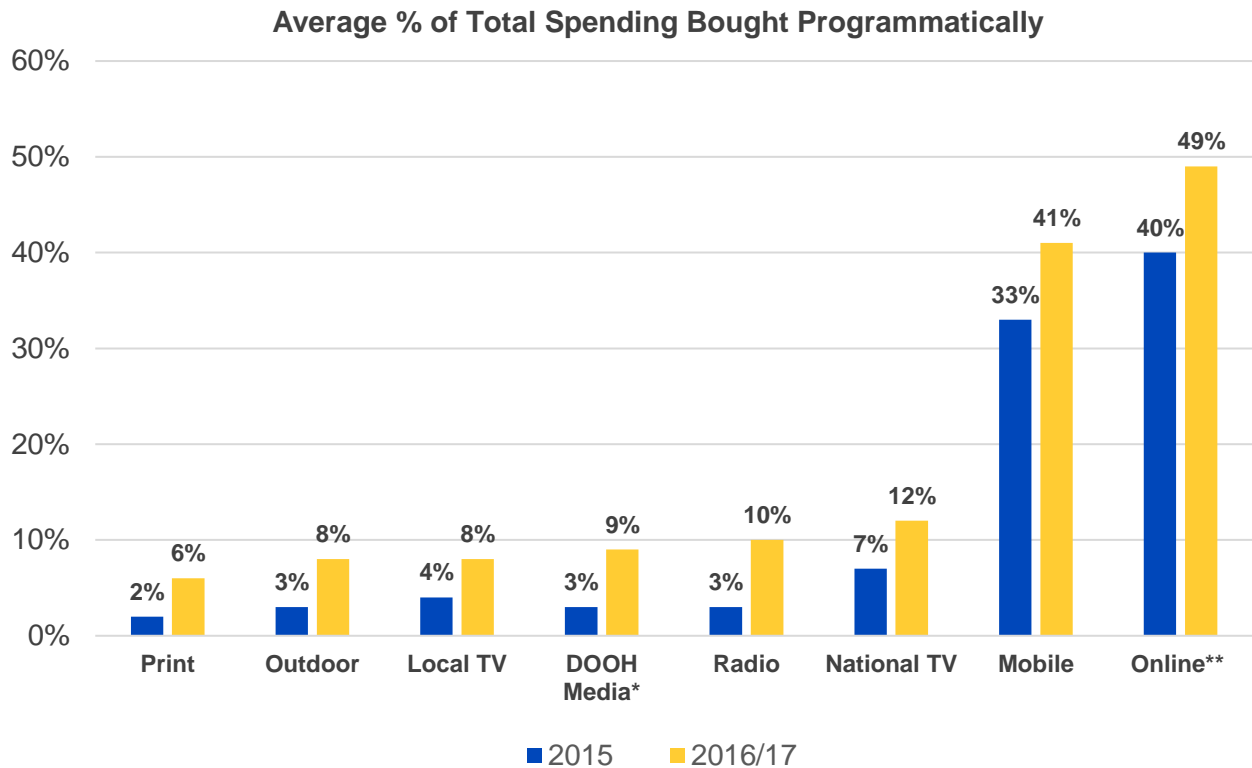
Beyond the medium’s foundational strengths, the survey results revealed other opportunities that the medium can capitalize on:

- The growth in **programmatic** buying;
- The appeal of the mix of ads and **content** on DOOH screens;
- Taking advantage of **existing measurement** technologies;
- Further leveraging the ties between **mobile** and DOOH;
- Getting DOOH into more **media planning systems**.

Programmatic Buying

Nearly all of the respondents (**91%**) **work on brands whose media are being bought programmatically**. That was also true in 2016/17 (when 89% did so). However, the percentage of the agency’s spending that was bought **programmatically increased for every medium** over

those two years, as can be seen in the chart on the following page.

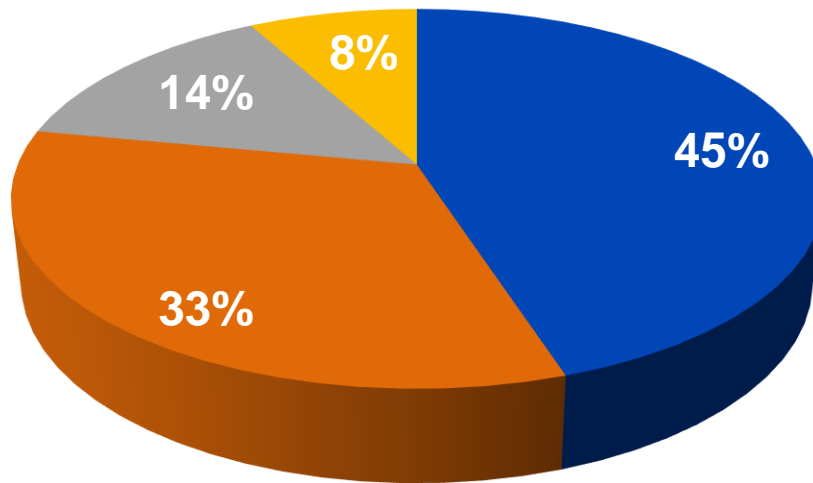


What percentage of your agency's total spending in each medium was bought programmatically?

As agencies increasingly embrace programmatic, DOOH media can take advantage of the programmatic wave. As was true in 2016/17, a **majority** of the survey respondents are **more likely to recommend DOOH media given its availability in programmatic buying systems**. It would be in the DPAA's interest to continue to promote the availability of DOOH media in these systems.

In addition, a majority (59%) of the planners and strategists indicated that they would be more likely to recommend DOOH in their media plans **if the medium were available in their preferred DSP**. Encouraging DSPs to add DOOH to their available channels represents a **potentially strong opportunity for the medium**.

If DOOH were available in your preferred DSP...



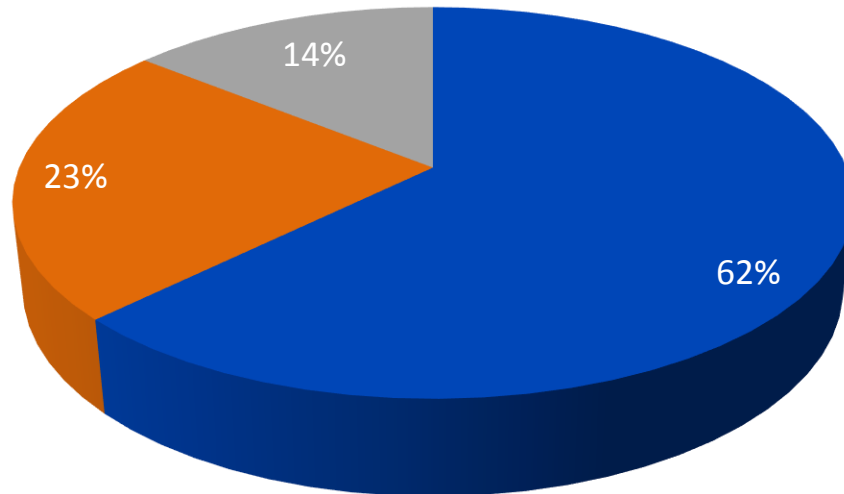
- More Likely
- No Difference
- Much More Likely
- No Preferred DSP/DOOH already included in preferred DSP

If DOOH were available as a channel in your preferred DSP, would you be much more likely to recommend DOOH in media plans, more likely to recommend DOOH in media plans, or would it make no difference?

Mix of Ads and Content

US media decision-makers overwhelmingly favor a mix of content and ads on DOOH screens. By a four-to-one margin, respondents indicated that they would be more likely to recommend DOOH screens with a combination of ads and content than DOOH screens that contain only ads.

Format More Likely to Recommend



■ Combination of ads and content ■ It doesn't matter ■ Ads only

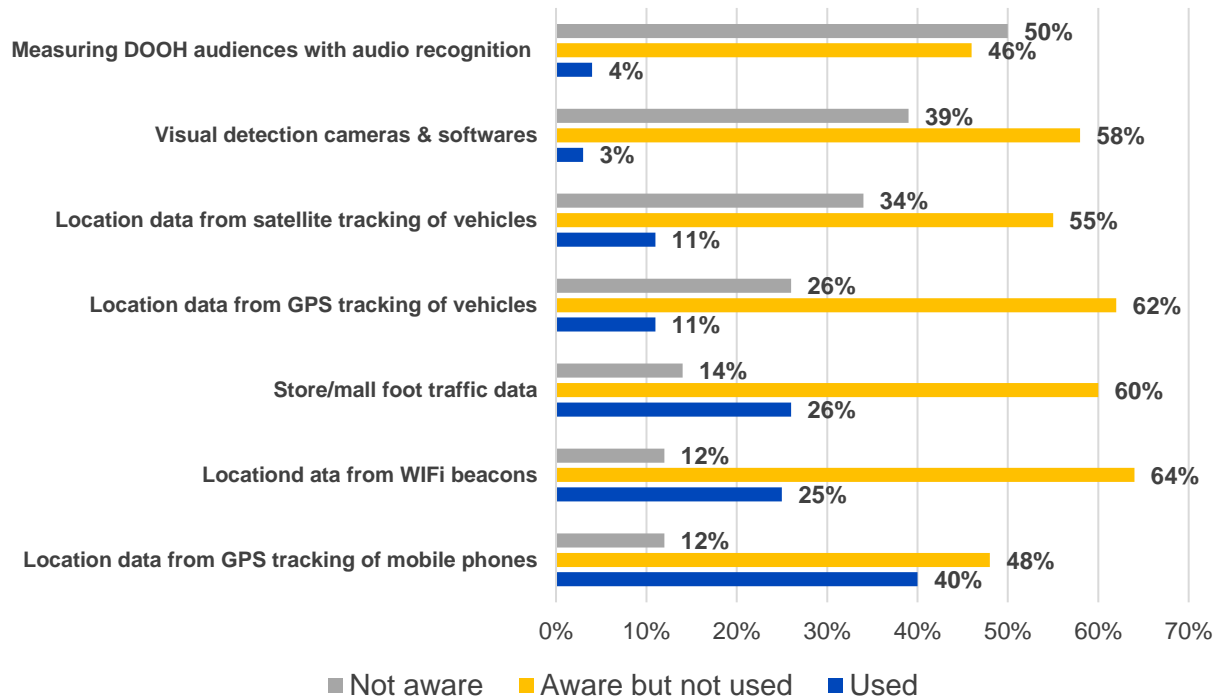
Which would you be more likely to recommend -- DOOH screens that include a combination of ads and content (sports/news/weather/entertainment) or DOOH screens that include only ads?

This preference can be positioned to the medium’s advantage in conversations with members of the agency community. Describing it as a **medium that isn’t purely advertising** should be appealing to a majority of them.

Measurement Technologies

As shown in the chart at the top below, most of the surveyed media decision-makers had either heard of or used most of the DOOH media measurement technologies we asked about. Levels of awareness were uniformly higher than levels of usage; there were more respondents who were aware of each of these technologies (without having used them) than respondents who had had experience actually using them. **Testing, deploying and publicizing these electronic data collection tools could generate interest in the medium**, because familiarity with them is already fairly broad within agencies.

Awareness and Use of Various Measurement Technologies

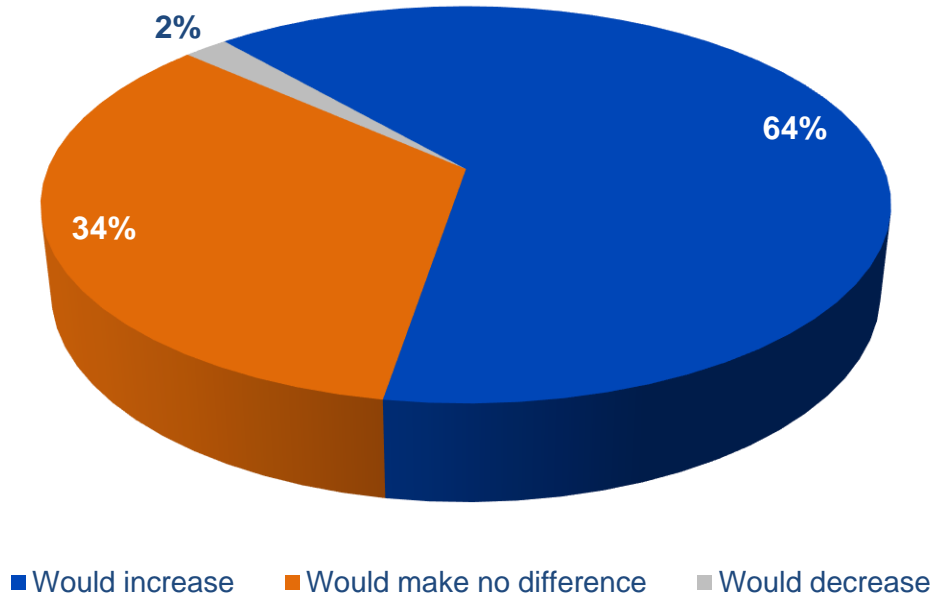


Are you aware of or have you used the following technologies through which exposure to DOOH media can be measured?

Some observations about specific technologies:

- Tracking locations through GPS-powered apps in mobile phones was the most widely-used of these technologies; 40% claimed to have used this kind of location-tracking data. Given that the link between DOOH and mobile is one of the medium’s key strengths, deployment of location data collection from mobile phones probably merits the most attention from the industry now.
- Since half of the respondents had not heard of audio recognition technology for measuring OOH audiences, it may be helpful to the industry in the long run to raise awareness of this technology.
- While visual detection technology was the second-least familiar of the seven technologies we asked about, nearly two-thirds of the media decision-makers (64%) **believe that deploying visual detection technology to measure and target DOOH media would increase the share of ad dollars** for these media (see chart below). Almost none (2%) believed it would reduce DOOH media’s share.

How Widespread Use of Video Detection Technology Would Affect Share of Ad Dollars Allocated to DOOH



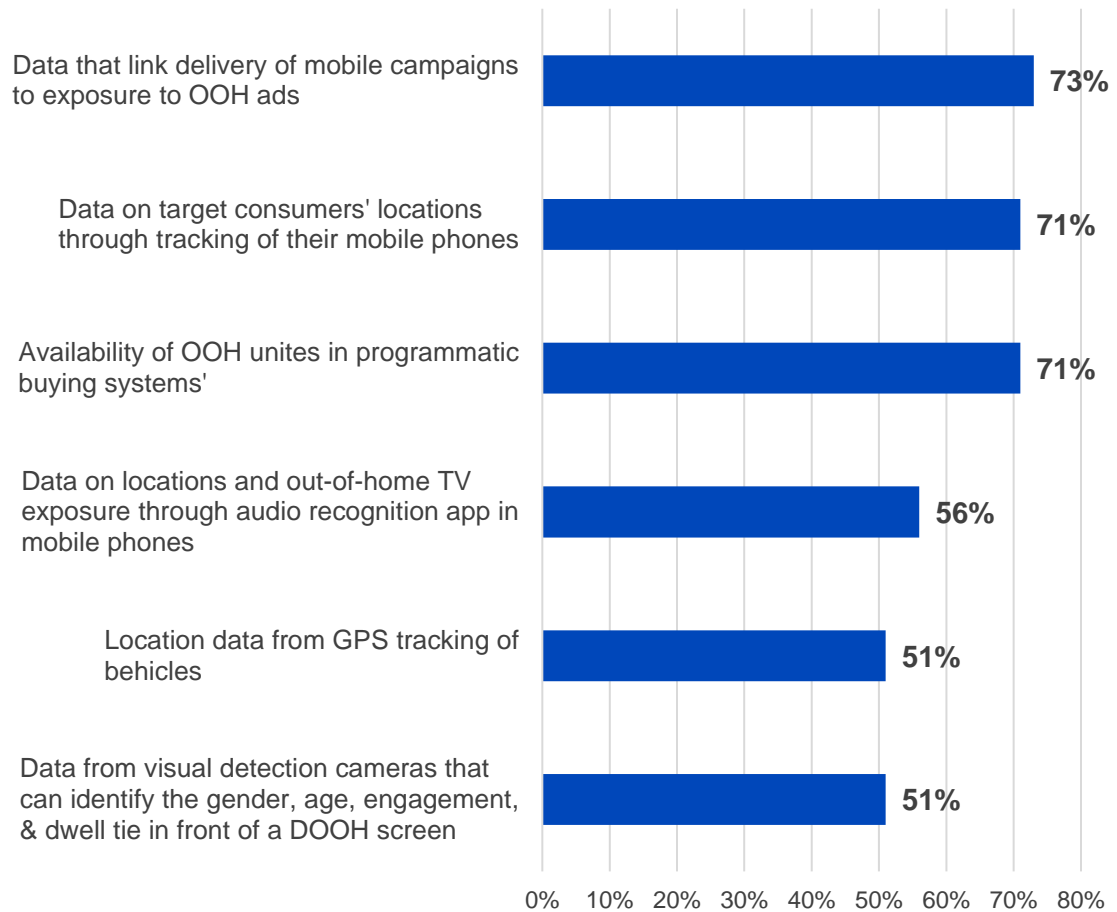
Do you believe that widespread use of visual detection technology in measuring and targeting DOOH media would increase the share of advertising dollars allocated to DOOH media, decrease . . . or make no difference?

Promoting greater deployment of visual detection technology represents a promising source of future growth for DOOH. However, the language used to describe it is important: A nearly identical question in the 2016 survey about “facial recognition technology” yielded much less positive results, with just 38% saying it would increase the share of DOOH.

Further Leveraging the Mobile Connection

As noted above, encouraging the ***use of location data from mobile phones represents a powerful potential opportunity*** for DOOH. In addition, seven out of ten of the media decision-makers (71%) indicated that they would be likely to recommend larger budgets for out-of-home in general (including DOOH) if data on target consumers’ locations via tracking of their mobile phones became more widely available (see chart below). A slightly greater percentage (73%) said that they would allocate more money to OOH if data linking delivery of mobile campaigns to exposure to OOH ads were more widely available. So, using mobile phone data benefits all of OOH advertising, not just DOOH. A bare majority made the same claim about visual detection data that can identify gender, age, engagement, and dwell time data; data from mobile phones exerts a stronger pull in the agency community.

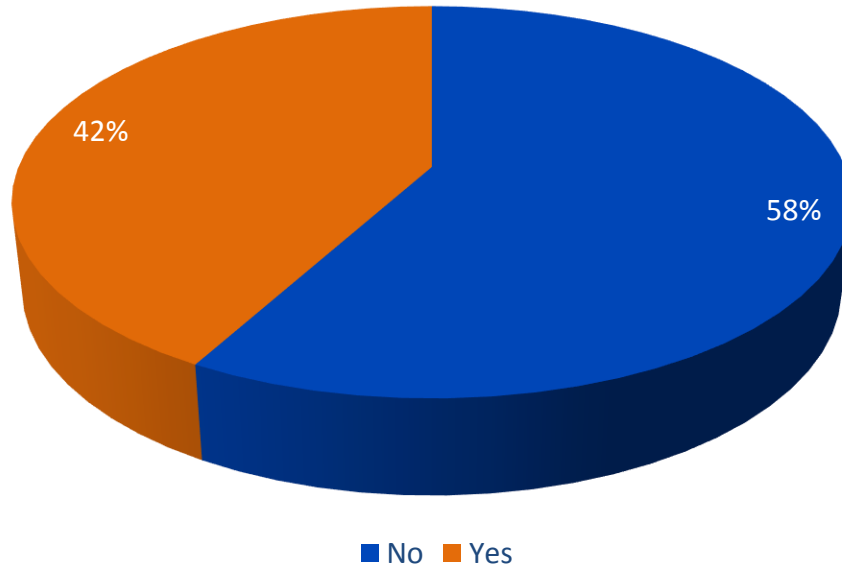
Would Recommend Larger Budgets for OOH if These Data Became More Widely Available



In the future, are you likely to recommend larger budgets for out-of-home, including DOOH if the following became more widely available?

Signaling their interest in data that can connect mobile to DOOH, 42% of agency decision-makers have targeted addressable mobile ads by using location-based sensors that can identify mobile device IDs. (See chart at the top of the next page.)

Use Data from Sensors to Target Addressable Mobile Phone Ads in Locations Equipped with Such Sensors



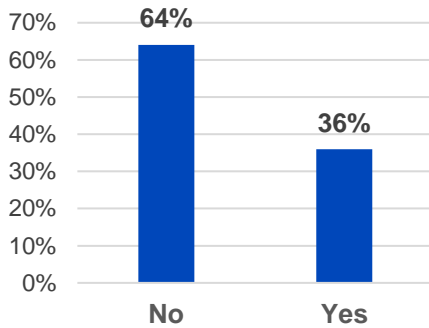
As you may know, it is now possible to target addressable mobile ads to mobile phones in locations equipped with sensors that can identify phone device IDs. Have you used such data to target mobile ads?

A final note on the results of the question about the potential triggers of larger OOH budgets: Responses to this question provide support for the idea that embracing programmatic represents an opportunity for all of out-of-home and not just digital out-of-home. The percentage who claimed that budgets would increase for OOH with the availability of OOH units in programmatic buying systems was nearly as high (68%) as the percentage who made the same claims about mobile location data.

Media Planning Systems

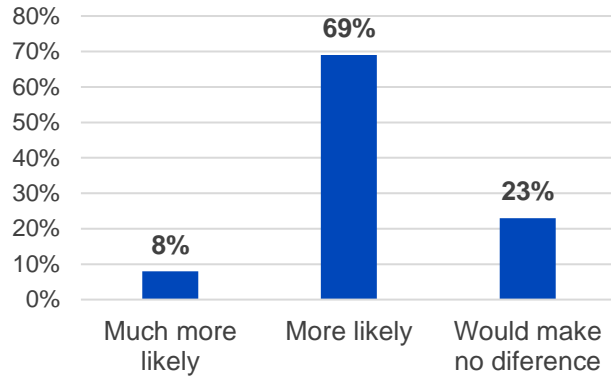
DOOH media is handicapped by the lack of DOOH options in widely-used media planning systems. Nearly two-thirds (64%) of the surveyed media decision-makers indicated that DOOH options were not represented in their agencies’ planning tools. This serves as a potential opportunity for the medium: As shown in the chart on the right on the following page, **over three-quarters (77%) of those without access to DOOH options in their media planning tools said that they would be more likely or much more likely to recommend DOOH if such options were added to their planning tools.**

DOOH Availability in Current Planning Tools



Are DOOH options represented in the media planning tools you use at your agency today?

Whether More Likely to Recommend if DOOH Options Added to Media Planning Tools



If DOOH options were added to your media planning tools, would you be much more likely to recommend DOOH in media plans, more likely, or would it make no difference?

Efforts to improve DOOH’s representation in media planning tools, if successful, should improve its share of advertising expenditures.

Priorities

In addition to the inherent strengths that can be promoted and the opportunities afforded by trends in the marketplace, the survey results suggest specific steps that the DPAA and its members can take to broaden interest in the medium:

- Media owners should conduct and publicize studies that demonstrate the medium’s ability to incrementally **move “the needle”** of key business outcomes.
- **Programmatic offerings should be expanded** by networks and platforms.
- Working with research and measurement companies to refine and showcase the **quality of targeting** data and audience delivery data;
- Media owners and mobile companies should expand the availability of **location data, and re-targeting.**
- A readily available database of inventory, including the availability of individual units.
- All entities including DPAA **should keep up its work with planner community**

Concerns about Recommending DOOH Media	2018/19
Lack of ROI data	52%
Inability to evaluate effectiveness of the medium in marketing mix models or multi-touch attribution analysis	37%
Lack of availability of audience delivery data	36%
Client(s) not fully knowledgeable about DOOH media	30%
Little confidence in audience metrics	30%
Little awareness of audience metrics	24%
Cost too high	22%
Lack of awareness regarding strengths/capabilities	20%
Insufficient reach for my brands	18%
Confusion/lack of understanding of audience metrics	18%
Concerns about consumer engagement	17%
Lack of awareness of companies/offerings	14%
Concerns about developing appropriate creative for DOOH	9%
Lack of expertise within my agency	6%
Do not know who, if anyone, handles DOOH media in my agency	5%
Other	4%
None	6%
What, if any, concerns prevent you from recommending DPB/DOOH media? Please check all that apply.	

Reasons for Resistance

This survey, like those in previous years, asked respondents to select their concerns about DOOH from a checklist we provide them. The percentages who checked each potential concern are shown in the table below. (Only four of the items in the checklist were repeated without modification from last year, and so last year’s results are not included the table. However, changes in the percentages who checked those four items are discussed below.)

Agency decisions-makers’ **greatest concern** that prevents them from recommending DOOH

media is the **lack of ROI data**. It is by far the greatest impediment to recommending DOOH media, checked by 15 percentage points more than the next most-often checked item and the only one on which a majority of the respondents agree.² This is one of several indications that the DOOH industry needs to work together to produce evidence of its impact on key business performance indicators in order to overcome doubts in the agency community.

Other observations about resistance to the medium:

- The second-most salient concern, the inability to evaluate the effectiveness of the medium through marketing mix models and multi-touch attribution, is related to ROI; these are statistical techniques for measuring the incremental lift that can be attributed to a particular medium and so are just specific tools that can be used to assess the business impact of DOOH spending.
- The **tier of concerns that ranked second** to business impact issues involve **audience data and metrics** – availability of audience delivery data (36%), confidence in audience metrics (30%), and awareness of audience metrics (24%). It is notable that the percentage who checked “lack of availability of audience delivery data” is exactly the same as in 2016. A substantial portion of agency planners and strategists continue to regard the quantity or quality of the data on DOOH’s audience as insufficient. Obtaining MRC accreditation for a DOOH measurement service would help to undermine such sentiments. The publication of general statistics about the medium’s audiences might also help to build confidence in existing audience data. Support for the collection of fresh data on the audiences of DOOH networks, perhaps through sources of mobile data, could also reduce concerns about the availability and accuracy of data on DOOH audiences.
- The percentage citing **“Cost too high” declined by seven percentage points**, indicating that the industry need not be too defensive about its prices.³
- Lack of understanding of the medium’s benefits or metrics (20% and 18%, respectively) does not appear to be major impediments to embracing DOOH within the agency community. However, agency decision-makers are more likely to believe that their clients lack knowledge of the industry (30% citing it as a reason for not recommending it). Outreach to advertisers about the benefits of the medium could be more helpful than outreach to agencies.
- Ranking at the bottom of the list of concerns are limitations of the decision-makers’ agencies -- lack of expertise within the agency, not knowing who is responsible for DOOH within the agency, and inability to execute a DOOH buy. Organizational impediments to executing a DOOH buy within agencies should therefore be a very low priority for the DPAA and its members.

³ The percentage who checked “Concerns about consumer engagement” was identical to the percentage who checked it in 2016 (17%), while the percentage who checked “Concerns about developing appropriate creative” dipped slightly (from 13% to 9%).

Data Needs

When the planners/strategists were asked to rate the importance of various types of data for evaluating DOOH media, the three types they ranked as **most important**, with over two-thirds rating them a 4 or 5 on a five-point scale, were . . .

- **Attribution studies** (75%)
- **Data on consumers' locations through tracking of their phones** (71%).
- Inclusion in **media planning software** for reach and frequency (69%) (See table below)

Importance of Various Types of Information to Evaluate DPB/DOOH Media (Percent marking 4 or 5 on 5-point scale)	2014	2015	2016/7	2018/9
Attribution studies ("Stronger attribution cases" in 2016)	NA	NA	62%	75%
Data on consumers' locations obtained through device IDs	NA	NA	62%	71%
Inclusion in media planning software for Reach & Frequency	71%	69%	69%	69%
Inclusion in marketing mix models	55%	61%	54%	60%
Searchable tool of inventory of all DOOH publishers' locations	44%	46%	47%	60%
MRC-Accredited data on DOOH audiences	NA	NA	58%	56%
Single-source data on TV and DOOH media audiences	NA	NA	53%	53%
Case Studies	70%	68%	68%	52%
Coverage in channel planning systems	34%	37%	41%	51%
Brand/Category ad spending reports	NA	NA	34%	42%
What types of information would make it easier for you to evaluate DOOH media?				

The prominence of attribution studies among agency decision-makers' data needs is consistent with their primary concern about the medium – lack of ROI data. Both types of information link expenditures in the medium to key business outcomes. The prominence of mobile tracking data among their data needs reflects the value of mobile among agencies, as noted earlier. And the importance with which they regard the inclusion of DOOH in media planning software was alluded to earlier as a strong potential opportunity for DOOH.

Other observations about the decision-makers' data needs:

- Both attribution studies and location tracking through mobile phones appear to have grown in importance in the last two years: The percentages who rated each of these types of data as important were both higher than the comparable percentages in 2016. It is possible, however, that the shorter, more generalized wording of these two items in the 2018 survey accounts for those increases.
- There was a sharp drop in the percentage who rated “case studies” as important in 2018. However, this, too, may be an artifact of a wording change: The 2016 wording included the descriptive phrase “Success Stories across different products/brands” which might have conveyed more excitement than “case studies” alone.
- Six out of ten of respondents (60%) considered **“Searchable tool of inventory of all DOOH publishers’ locations”** to be important in making it easier to evaluate DOOH media. **There are many options in this field, and searchable inventory options to planners has become easier over the years but still remains an opportunity to ease the execution of DOOH.**

Data Needs Verbatims

Indeed, when agency planners were asked in an open-end question about the types of information that could facilitate recommending DOOH more often, information on available inventory was one of the most prominently mentioned (see table below). A couple of the verbatim responses suggest the appeal of an inventory database:

“The better understanding of footprint across the US as well as abilities to tap into multiple vendors inventory all together vs having to have separate conversations with each.”

“Platforms like Adomni or Billups where all the inventory is aggregated with shots of each billboard and stats all in one place.”

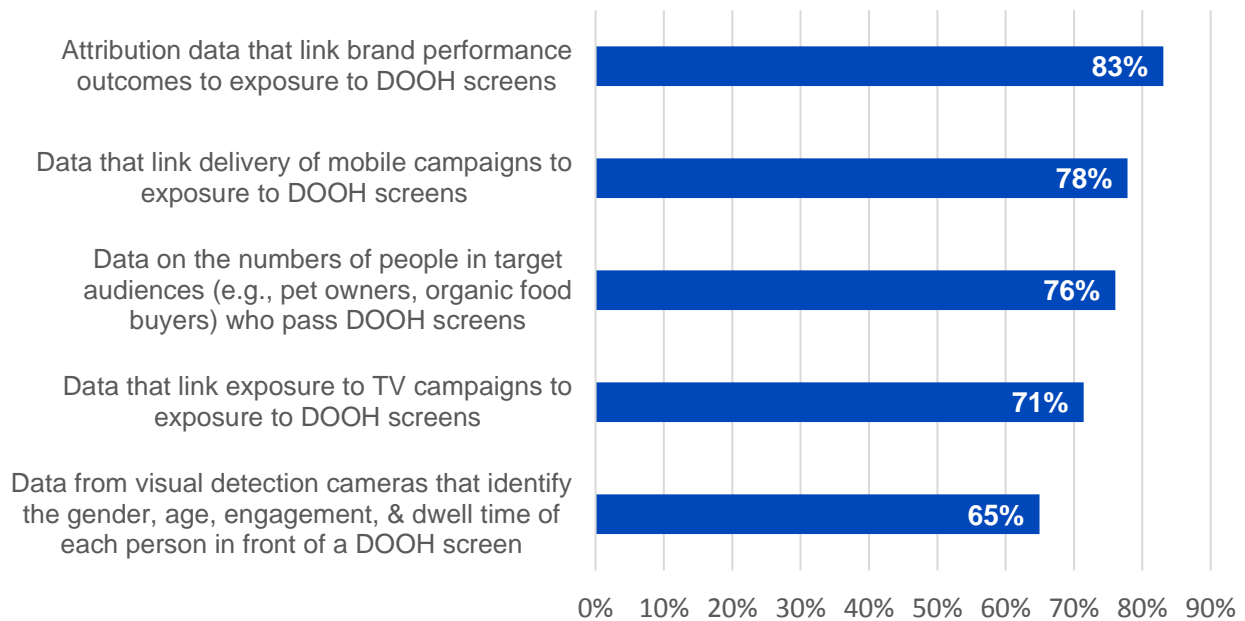
Greater access to exposed vs control audience and sales lift. Recall studies and better understanding of ROI

Information about available inventory and about the areas in which the venues are located are the sorts of information that DOOH networks could readily provide. In summary having a searchable tool of inventory across a number of DOOH networks was the top response among agencies when asked in an open-ended fashion and fourth in the aided question of what types of information would make it easier to plan DOOH.

Types of information that could facilitate recommending DOOH media more often	% of those answering
Available inventory	11%
Better measurement (general)	11%
Measure effectiveness	11%
Reach/Frequency/Impressions	11%
Measurement/Tracking	9%
Attribution	8%
Pricing	8%
ROI	8%
Capability, not data	6%
Sales lift studies	6%
What types of information could facilitate recommending DOOH media more often (open-end);	

Results of the survey question about whether certain types of data would incline the respondents to be more likely to recommend DOOH in the future support the conclusions drawn from the prior questions about the types of data that would most appeal to agency decision-makers. The data from this question are shown in the chart below.

More likely to recommend DOOH if this type of data were available



Would you be more or less likely to recommend DOOH in future media plans if the following types of targeting data were available to you?
 Note: Base excludes those who said that they do not recommend media plans.

As can be seen in this chart, over three-quarters of the respondents said that they would be **more likely to recommend DOOH** in the future if the following types of targeting data were available to them:

- **Attribution** data linking brand performance to exposure to DOOH screens (83%)
- Data linking delivery of mobile campaigns to exposure to DOOH screens (78%)
- Granular audience composition (e.g. organic food buyers) data on the people passing DOOH screens (76%).

These data indicate that . . .

- **Attribution**, which is a means of establishing ROI, emerges as one of the most powerful types of data for boosting adoption of DOOH media;
- The link between mobile and DOOH again represents a strong opportunity for DOOH;
- There is strong interest in data about DOOH audiences beyond their demographic characteristics;
- Visual detection technology, while viewed as benefiting the medium, does not appear to be as worthy of major investment as attribution, mobile, and audience composition data.

Finally, we asked respondents specifically whether there was **anything that would incline them to favor DOOH media over digital and mobile**. One of the **most common** categories of answers (mentioned by 15%) centered on business performance measurement – **attribution, marketing mix modeling, and ROI**. (See table at the top of the following page.)

Another of the common categories of answers centered on the impact of the creative itself due to the nature of the medium. Echoing some of the responses to the open-end question about why they recommended DOOH, 15% of those who answered the question about what would move them away from digital and toward DOOH noted the ability of DOOH to **enhance the power of the creative more than digital or mobile are able to**. Examples of these comments are shown below:

“If the creative is good, the bigger screen can make more of an impact”

“Unique, large-scale creative executions that are more memorable than a digital/mobile ad.”

“Experience - interactive creative or experiences, high impact, memorable. I think mobile campaigns are mostly unmemorable as people become more and more banner blind and unwilling to interact with ads. DOOH could have the opportunity to combat that with larger than life experiences.”

Their verbatim comments serve to reinforce the earlier observation that one of the medium’s “niche” strengths, in the thinking of some agency decision-makers, is the *experience* DOOH can deliver, exceeding any sort of experience that a smaller screen can offer.

Would Incline Them to Favor DOOH Media over Digital and Mobile	% of those answering
Nothing	19%
Attribution/Marketing Mix Modeling/ROI	15%
Impactful creative	15%
Campaign strategy	12%
Targeting	12%
Addressability	8%
Path to purchase	8%
Tracking	8%
Effectiveness / Drive results	8%
All other responses given by one person	31%
Is there anything that would incline you to favor DOOH media over digital and mobile? If so, please describe. (Open-end) Base: Those answering	

A couple of the other verbatim comments are worth quoting for the unique perspectives they reveal. One of them advocated the use of DOOH for audience targeting in this way:

“Depends on consumer path to purchase, or media behavior. For example, DOOH is a great way to reach A50+ who may not be engaged in digital as often”

The other interesting comment was about the medium’s potential for addressability:

“If we can start dayparting our buys and truly buy screens to target customers across the entire network. . . . Lets be honest, a digital bulletin is still mass, so how can we make it more personalized? More of a 1:1 communication tool? How can I start to use traffic cameras to track audiences and serve the right message to the right person as they drive by? It is creepy, but its what we are doing in the digital space already...”

Other Factors

The management of video, OOH and omnichannel campaigns within agencies has not changed much since 2016 although there is a **trend for OOH groups to be less siloed**. About one quarter of agencies manage omni-channel/video-neutral campaigns with separate groups for TV, mobile, digital, and DOOH; another quarter integrate the management of all of these video screens into a single group; and just under half of them have a hybrid structure that doesn’t fit either the separate or integrated paradigm (see table below).

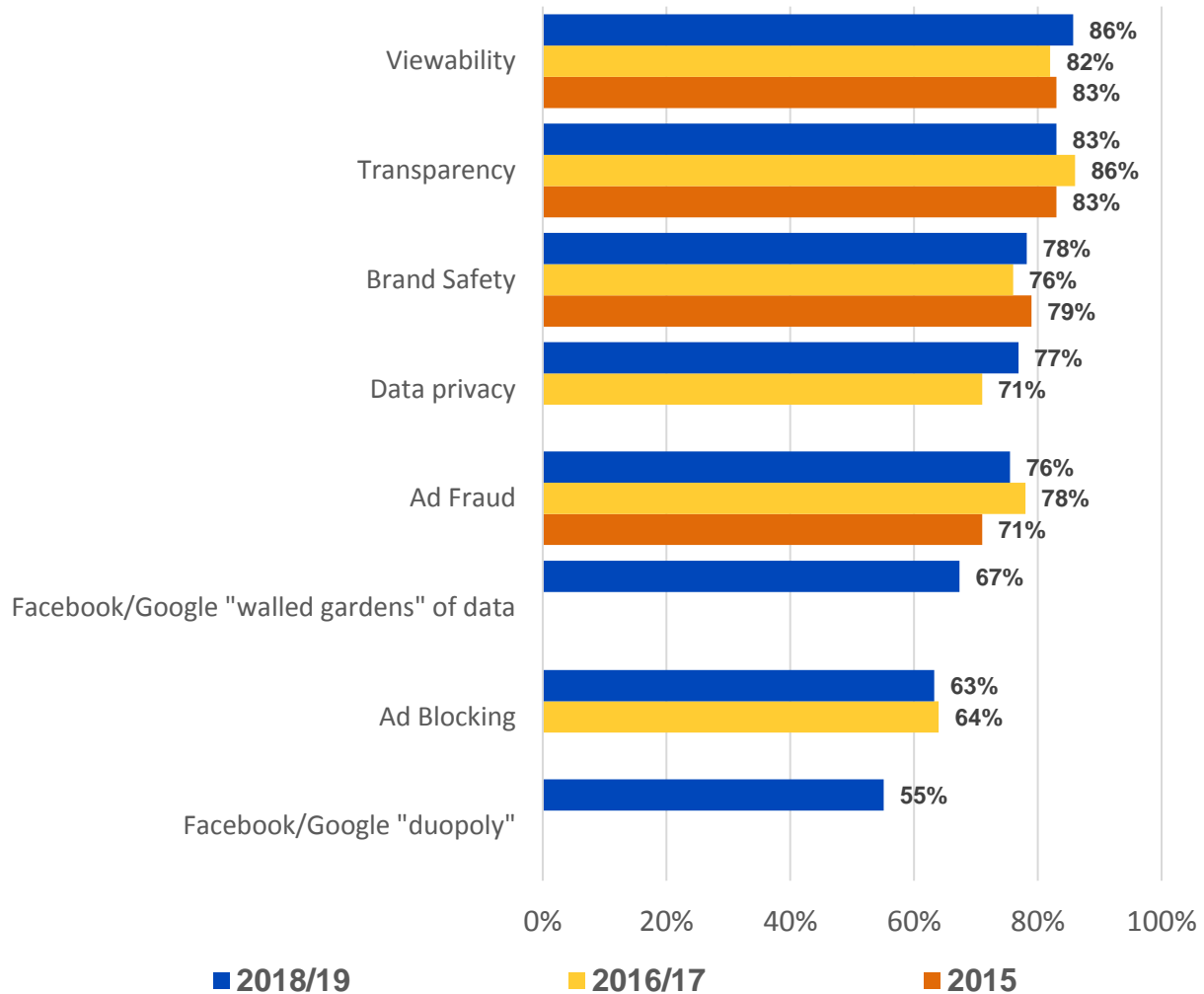
How agencies manage omni-channel video-neutral campaigns today	2015	2016	2018
Separate groups for TV, mobile, digital, DOOH	31%	23%	28%
Integrated Video (Single group for TV, mobile, online, DOOH)	19	26	23
Hybrid (Combination of separate and integrated)	50	52	48
How does your agency manage omni-channel, video-neutral campaigns today?			

Issues with Digital Media

As can be seen in the chart at the top of the following page, concerns about the well-known problems associated with digital advertising, such as transparency, viewability, brand safety, fraud, and data privacy, **have not abated** in the media agency community. Over three-quarters of agency decision-makers rated most of these issues a 4 or 5 on a five-point scale of concern. These levels of concern are generally within two or three percentage points of their levels in 2016, with the exception of concern about privacy, which has risen by six percentage points. Of the six issues asked about in both years, **viewability is now the leading cause for concern by a slight margin, while ad blocking remains behind the others as a cause for concern.**

In addition, two-thirds of expressed concern about Facebook’s and Google’s control over their data (“walled gardens”), and over half expressed concern about the substantial share of digital advertising budgets they command (“duopoly”). The Facebook/Google issues tend to inspire less concern than the problems associated with the advertising on the medium, with the exception of ad blocking.

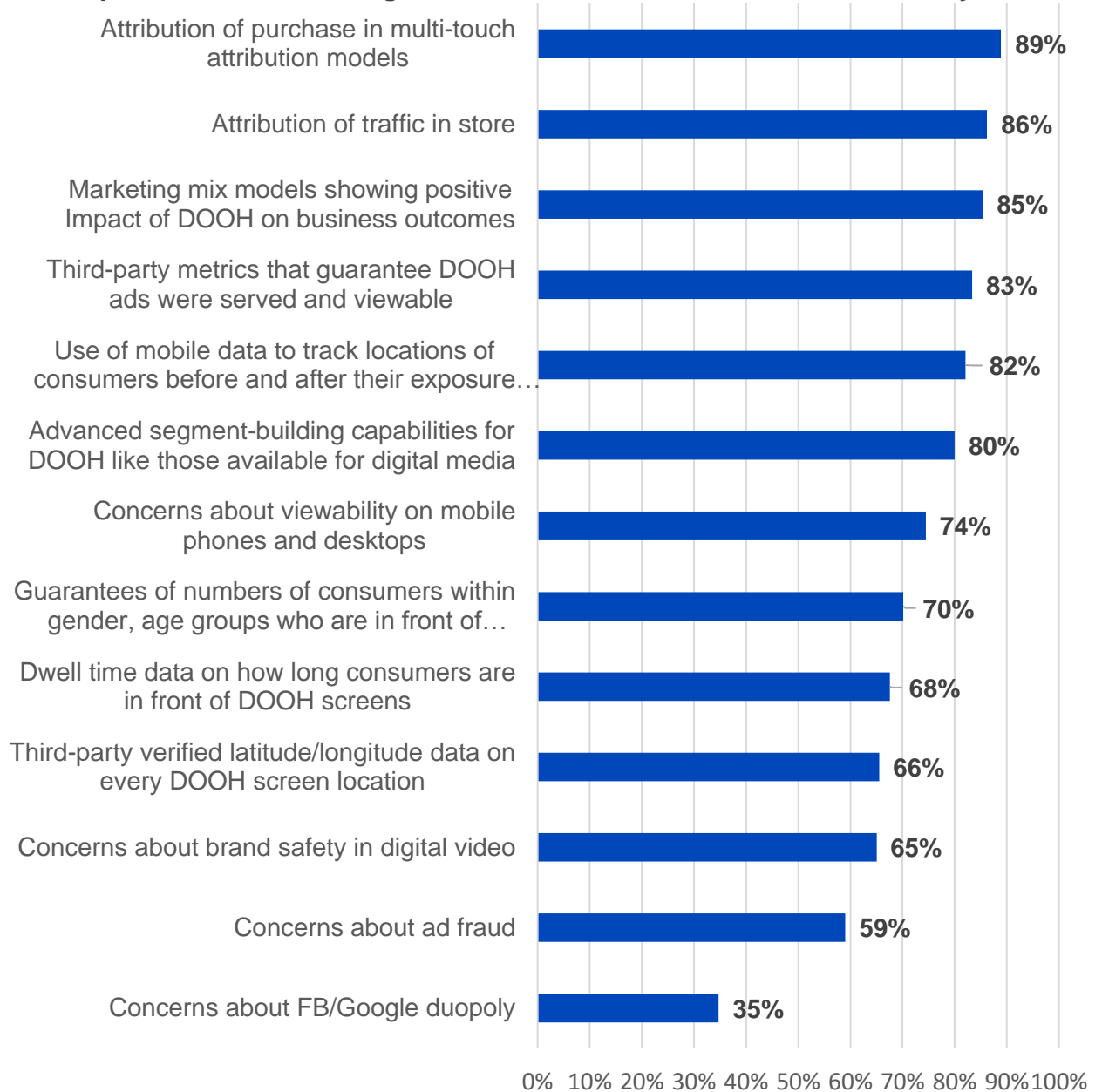
**% Concerned about issues associated with online/digital buys:
Top 2 Box on 5-point scale**



How concerned are you about the following issues associated with online/digital buys? (Scale from 1 to 5 where 1=completely unconcerned and 5=very concerned)

Nonetheless, in spite of these broad concerns about digital advertising and the leading digital companies, these concerns generally rank low in respondents’ perceptions of the factors that are driving the growth of DOOH in location-based media buys (see chart on next page). Three of the four factors related to problems with digital ranked last in the list we asked about; the Facebook/Google duopoly was considered by far the least important factor in driving the growth of DOOH. Instead, the three factors that are considered most important in driving the growth of the medium are those identified earlier as priorities for the industry – data that link exposure to DOOH screens to business outcomes through attribution and marketing mix models.

Percent Important Factor in Driving Growth of DOOH in Location-Based Media Buys



35. Which of the following do you consider to be important factors in driving the growth in DOOH in location-based media buys? (Columns for "important factor" and "less important factor")

Final Suggestions

Majorities of the surveyed planners and strategists believed every one of the factors listed in the questionnaire, to be an important factor in driving the growth of DOOH. Beyond the top three factors involving attribution and marketing mix modeling, the three that received the most support were:

- Third-party metrics that guarantee DOOH ads were served and viewable;
- Using mobile data to track locations of consumers before and after their exposure to DOOH screens;
- Advanced segment-building capabilities for DOOH like those available for digital media.

Each of these factors was checked as an important factor by at least 80% of the respondents. The level of support for the mobile tracking factor is not surprising, given the prominence of mobile in the thoughts of agency strategists and planners. The other two merit serious consideration as priorities, because in addition to being deemed important, they seem eminently practical, entailing less experimentation and fewer concerns about data privacy than granular mobile data. It would behoove the DOOH industry to explore the possibility of working with third parties to provide auditing services for the delivery of DOOH ads and to create advanced segments that can only be offered by a medium that captures consumers while they are actively “on the go.”

APPENDIX

ABOUT THE SURVEY

The DPAA invited 2,576 media professionals employed at full service, media services and digital ad agencies to participate in the survey. The study was in the field Q4 2018. This report is based on the responses of the 219 individuals who reported that they worked at agencies in a media or strategic planning role. Another seven respondents screened out after the first question, because they answered that they had no role in media or planning.

Many of the survey's questions were replicated from prior planner survey questionnaires in order to enable the reporting of trends. The term "DOOH" was used in most of the questions, replacing the term "DOOH/DPB" in the 2016 survey (which, in turn, replaced the term "DPB" in the 2015 survey). In addition, respondents to the 2018 survey are more senior, with respect to their job titles, than the samples of the previous three planner surveys.

ABOUT THE RESEARCH

The goal of this research was to secure insights from agency planners and media strategists in the following areas:

- Usage of DOOH media
 - Proportion of recommended plans including DOOH media
 - Proportion of recommended plans with DOOH media approved and executed
 - Usage of mobile and DOOH together
 - Projected change in DOOH spending
 - Point in the process at which DOOH media were considered
 - Reasons for including in media plans
 - Factors that could influence future use
- Knowledge of DOOH
 - Unaided and aided awareness of individual DOOH media companies
 - Knowledge of SSPs for buying DOOH
 - Awareness of DOOH media measurement methods and technologies
 - Awareness of the DPAA
- Perceptions of DOOH media
 - Concerns about the medium
 - Preference for ads and content vs. ads only
 - National vs. local medium
 - Importance of DOOH screens in a video-neutral campaign
 - Types of data, tools, technology, other factors that would encourage greater DOOH shares of media budgets
- Perceptions of OOH

- OOH media’s fair share of total media spending
- Perceptions of complementary and competing media
 - Video-neutral, digital, mobile
- Current and future use of programmatic systems.

The survey included 42 questions, some of which were repeated from prior media planner surveys. Four of them, including one about unaided awareness of DOOH media companies, were open-end questions. The 2016 survey questions’ references to “DPB/DOOH” were changed to “DOOH” in this survey. This year’s sample was drawn from XXXX, while the previous sample was pulled from YYYY.

PROJECT EXECUTION

This year’s sample frame consisted of 2,576 media professionals employed at full service, media services and digital ad agencies. The sample was sent an email invitation to participate in an online survey and offered a \$25 Starbucks gift card as an incentive for completing it.

Of the 226 who responded, seven who answered that they were not employed in a media or planning role were screened out at the first question and are not included in these results. While the final 2018 sample of 219 is smaller than the sample of 336 in 2016, the initial mail-out in 2016 was larger (3,004).⁴

COMPOSITION OF THE SAMPLE

The sample has become increasingly senior since 2015. The percentage of the 2018 sample with junior-level titles such as “planner,” “media strategist,” and “media specialist” is about half the corresponding percentage in 2016, while the percentage with titles of Assistant Director or higher has risen from 46% of the sample to 59%. Nearly half (45%) are at the Assistant Director to Director level:

Respondents by Job Title	2014	2015	2016/17	2018/19
Assistant/Senior Planner/Planner*	56%	32%	27%	14%
Supervisor	19	30	22	19
Manager	NA	7	5	3
Assistant/Associate Director/ Director	17	25	38	45
VP/SVP/EVP/Partner	7.5	6	7.5	14
Other	1	1	2	5
Total	100	100	100	100
* Includes “strategist,” “specialist,” and “associate” Base: N=145				

⁴ Since 67 of the initial invitations bounced, the survey’s response rate was 9% (226/ 2,576-67)). A total of 798 recipients opened the invitation email, and 239 clicked through.

As was true in 2016, the 2018 sample is evenly split between full service and media agencies (44% for the latter, 43% for the former. See table at the top of the following page). Another 12% work at digital agencies. None work at out-of-home agencies.

Respondents- By Type of Agency	2014	2015	2016/17	2018/19
Media Services Agency	63%	61%	47%	44%
Full-Service Agency	28	34	45	43
Digital	8	6	8	12
Out of Home	0	0	0.4	0
Other	0.7	0	0	1
Total	100	100	100	100

Base: N=145