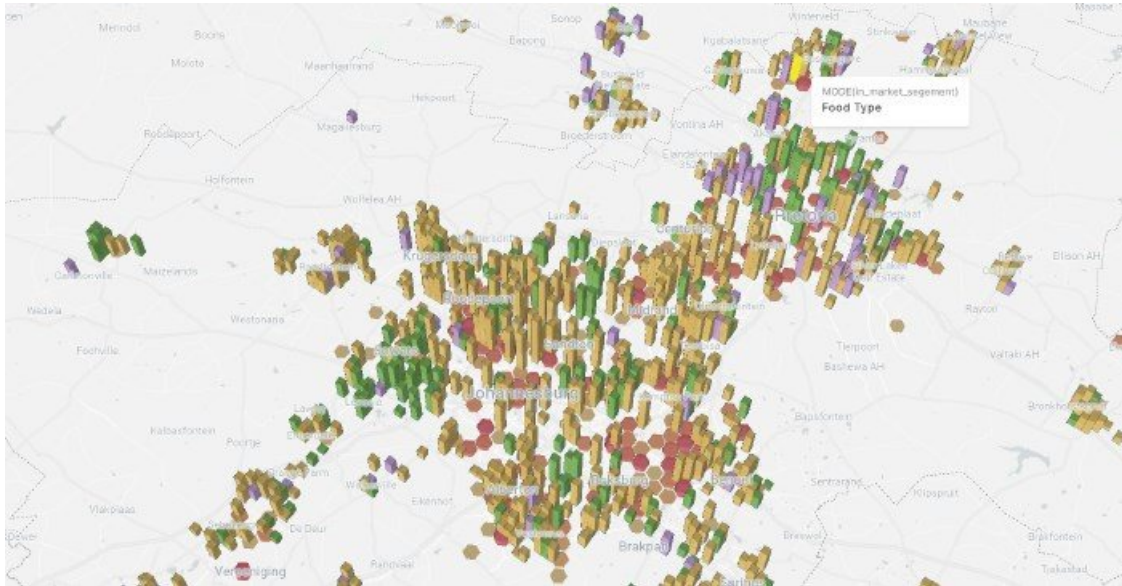


The biggest opportunities that mobile data and location technology offer the OOH and digital OOH industry

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We can all agree that OOH is digitally transforming at break-neck speed, Covid pushed the Fast Forward button and it hasn't let up since. The days of thumb sucking traffic counts is not a too distant memory either which makes the pace of change all the more outstanding (not to say there isn't still some thumb sucking), says Vicinity Media co-founder and CEO Daryl van Arkel.



The rise of technology in OOH has impacted buying and selling, creative delivery, audience measurement, attribution, reporting, to name a few, but what are the biggest opportunities *that mobile and location technology offer OOH and DOOH that have not yet been embraced fully or at all, and still offer a major upside to the various stakeholders in the industry?*

Let's explore this, but first, for those not in the know, the data landscape is broad and may need some clarity, here is a small window into some types of location data that exist:

- **OOH site location data** which can include not just site location, but things like site rating, position, obstruction, etc.
- **Area data** which can include area demographics, node type, e.g. residential, business retail, etc.
- **Store location data** – where the store is, but also what category the store falls into, the operating hours, attributes such as drive thru; delivery; take away; dine in; store based reviews from Google Maps, other mapping platforms.
- **User location data** – location of a user as tracked by an app/mobile website which can include historic visit patterns and In market signals such as user visited a dealership.
- **Mobile engagement data** such as in-market signals and campaign engagement, search behaviour, web browsing data, store visit data.

Importantly this data is only truly useful in OOH when it is location relevant due to the nature of OOH being intrinsically location based.

Each of these data sources has many attributes that can add colour and insight to stakeholders.

Let's examine some of the opportunities I see for each stakeholder.

Media owners

Without the media owners there is no media, and having been an out-of-home media owner I understand some of the challenges faced.

One of the key challenges in OOH is pushing the button on a new site investment, this decision making has become even more critical with the increased investment cost associated with digital sites versus static sites.

Choosing the correct location has often been based on opportunism, position on a busy road, potential access to the landlord, council factors, how many cars pass by, and a good deal of gut feel on whether it is marketable.

Bringing location and mobile data into this process could supercharge this decision making and boost ROI substantially for media owners *and* very importantly create a less cluttered, less highly concentrated OOH landscape.

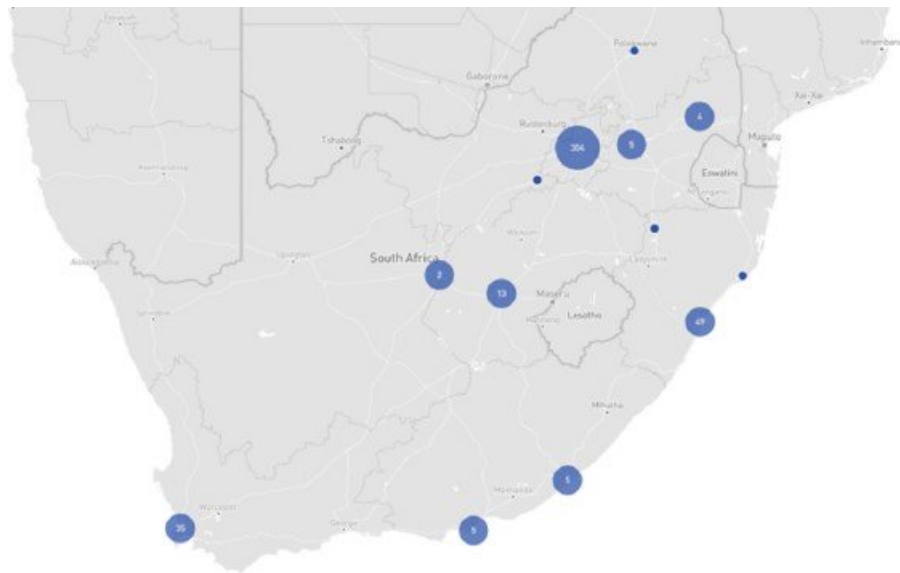
Here is an example of how this could be undertaken:

- Analysing all sites in an area geospatially in relation to one another and identifying gaps at locations that are less cluttered with lower competition for new sites.
- Obtaining an accurate assessment of audience numbers, through the utilisation of mobile user counts in a specific area combined with traffic flow data applying CPM and sell through scenarios to evaluate the feasibility of the site including the potential return on investment (ROI) and the breakeven point.
- Analyse POIs nearby that can be leveraged for location targeted campaigns and build out a sales plan based on these retail outlets.
- Analyse area demographics including income levels and include these in your scenarios in order to answer the question of how desirable the audience is which will impact sell through and CPM achievable.
- In-market data – although this data has an expiration date, analysing patterns can yield insight into economic activity of the audience engaging with the potential site.

Even utilising one or two of these techniques can result in infinitely better decision making when investing in a new site *or not* investing in a new site that could oversaturate an area and ultimately bring down CPMs.

Add the benefit of programmatic selling of the inventory that can close the ROI gap through faster monetisation than traditional sales approaches, and more democratised buying behaviour based on mobile and location data (more equitable buying process, based on the merits of the site rather than personal biases or relationships) means a sites ROI could be vastly boosted and its breakeven cycle vastly shortened.

Below is a snapshot of the over-concentration of DOOH in South Africa, with simple geospatial analysis opportunities are easily spotted both nationally and on a localised level.



There is a significant opportunity for smaller media owners to level the playing field against bigger players with larger sales teams and better access to budgets by utilising mobile engagement data such as in-market data to boost their sites' marketability to various advertisers. Data based buying should begin to overturn traditional buying models in short order.

Omnichannel opportunity:

With digital transformation and the horizontalisation of data across media types which has seen DOOH starting to move squarely into a 'digital channel', along with the ease of planning and buying omnichannel campaigns, media owners will begin to unlock budget never before seen for OOH.

What opportunities exist for brands?

More efficient buying, better reporting, better media ROI, lower costs, easier to rotate and increase reach, fast creative changes, A/B testing, lower production costs, dynamic creative messaging at scale, frequency capping, and measurement; we can see there are many and I only have 2,000 words in which to get my message across...

In my view, the largest untapped opportunity for brands centres around measurement of (D)OOH, not just the measurement of the audiences that were seen around a site before, during, after; but measurement of core conversion metrics that prove efficacy of specific sites running in an (D)OOH campaign.

Although we are seeing the rise in use of footfall uplifts to measure store performance there is a massive opportunity to

measure other metrics that are known consumer behaviours post exposure to OOH, such as searching or visiting a brand's website. Vicinity Media's DOOH measurement suite seeks to close this measurement gap and I believe this will be a game changer for brands and the industry as the blind spot in OOH will be well and truly opened up.

DOOH is typically one of the most underreported and under-measured mediums and technology can change this significantly.

Another massive opportunity which seems to be underutilised is the use of dynamic creative messaging at scale.

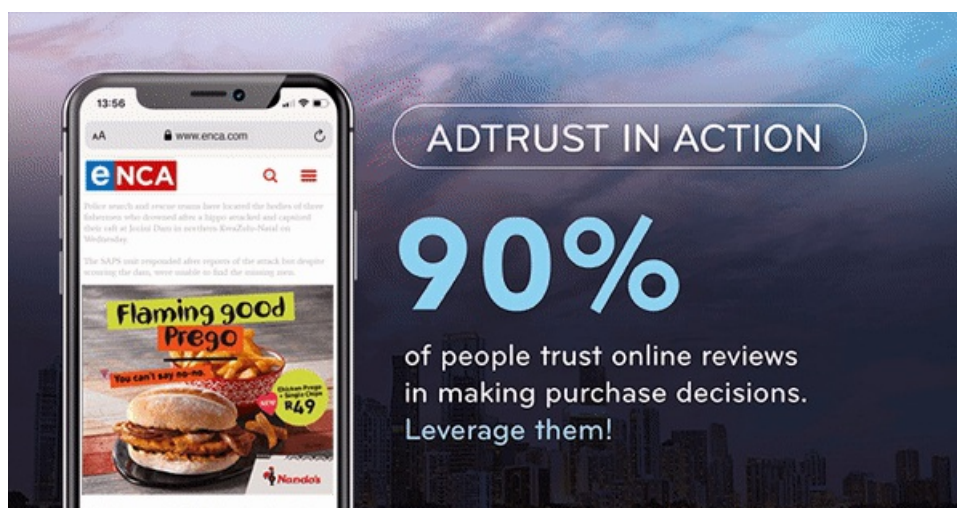
OOH is the ultimate location based medium and thus has the ability to be truly localised and relevant to the audience where it is positioned, even to the point of dynamically pricing for a certain audience or implementing localised or store-based offers without incurring additional production costs.

This can be done at scale, at low cost, and in real time boosting conversion rates, and offering A/B testing opportunities that the brand can learn from. For example, which product and at what price do an audience convert in a certain area versus another could improve margins in certain areas and boost low performing areas/stores where pricing is out of reach but without cannibalising the brands national pricing strategy. This approach has the ability to be a game changer for national brands.

In addition, the store data mentioned at the beginning of this piece can be used to generate dynamic creative such as leveraging operating hours to display creative for a 24 hours drive thru store, or tapping into specific attributes of a store such as Halaal menu, delivery service, or breakfast menu.

A brand can even leverage positive sentiment by including reviews from mapping and directory platforms such as Google, Tripadvisor, Facebook Places.

This has been used very effectively in mobile and can easily be extended to DOOH, an example of this is action can be seen here: <https://www.bizcommunity.com/Article/196/12/206325.html>



Opportunities for media agencies

Agencies are often at the sharp end of new technologies and digital transformation. But the benefits and opportunities to leverage mobile and location data are highly beneficial, the largest under utilised of which I see is omnichannel planning, buying and execution.

Agencies have traditionally had to build multiple channel and medium competencies, and the omnichannel approach opens up the opportunity for rationalisation of talent with hybrid planners and strategists who can work across media effectively through having access to unified horizontalised data that spans channels and mediums.

Allied to this planning data, is unified reporting, a major benefit for agencies to get a single view of activity and lower the

reporting and post campaign analysis over head.

Finally this data opens up opportunities to execute highly creative and high performing campaigns that position agencies as drivers of creative multi-channel campaigns that don't require a dearth of resources to execute.

In closing, as Steve Jobs said: "Innovation distinguishes between a leader and a follower."

The opportunities to leverage data and technology are extremely exciting for the OOH as a whole and it has the ability to elevate the medium to a leader in the share of media spend in South Africa in the coming years.

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