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## Barometer Member Survey Report: Location-Based Advertising Insights

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Powerful Digital Leadership



# Industry Perspectives from the Source.

## The people speak!

As the only association dedicated 100% to supporting the growth of the Canadian Internet and allied digital advertising industry, IAB Canada is able to leverage its representative membership to gain unique perspectives on issues and data that directly impacts the Canadian marketplace.

In our second IAB Canada Barometer survey for 2017, we asked all IAB Canada Members to share their unique thoughts, views and prognosis for the future of the Digital Out-of-Home advertising as part of Canada's Location-Based media industry.

Survey Ask...

*"In today's mobile world, the OOH channel is starting to deliver traffic to advertisers based on an incredibly refined new order of knowledge, due to Mass mobile adoption and the use of data from mobile devices / cell towers. IAB Canada would like to hear from its members about the ways it - and especially Digital Out of Home signage (DOOH) - is being adopted and used within the advertising community".*

Survey recipients were also asked to pass it along to others who are well-suited to complete the survey.

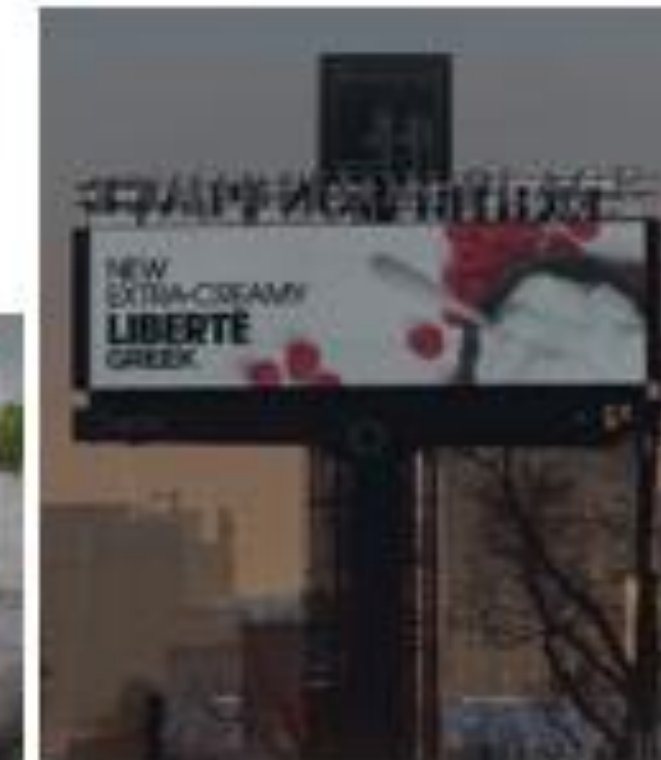
# Here's what we're talking about.

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.

OUTdoor DOOH examples →



INdoor DOOH examples



Venue DOOH signage



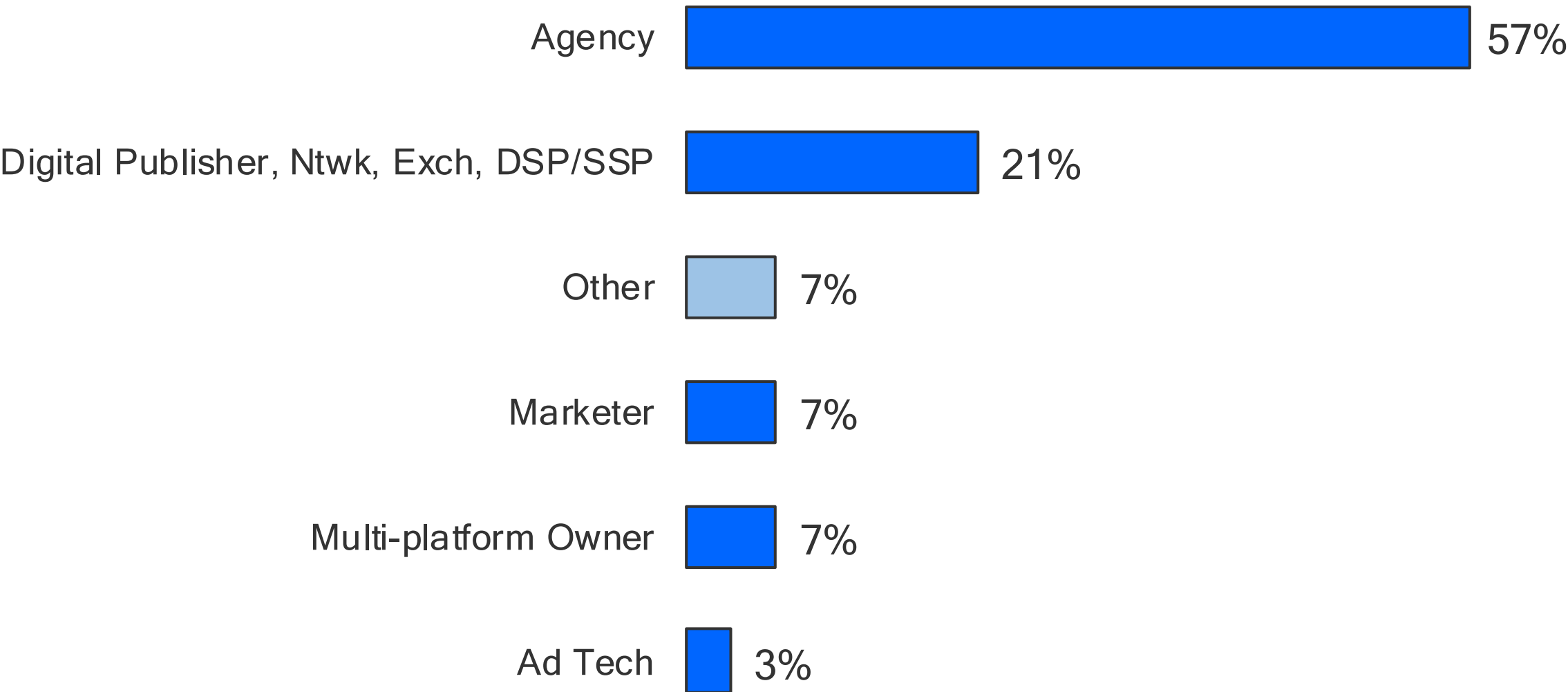
Transit DOOH signage



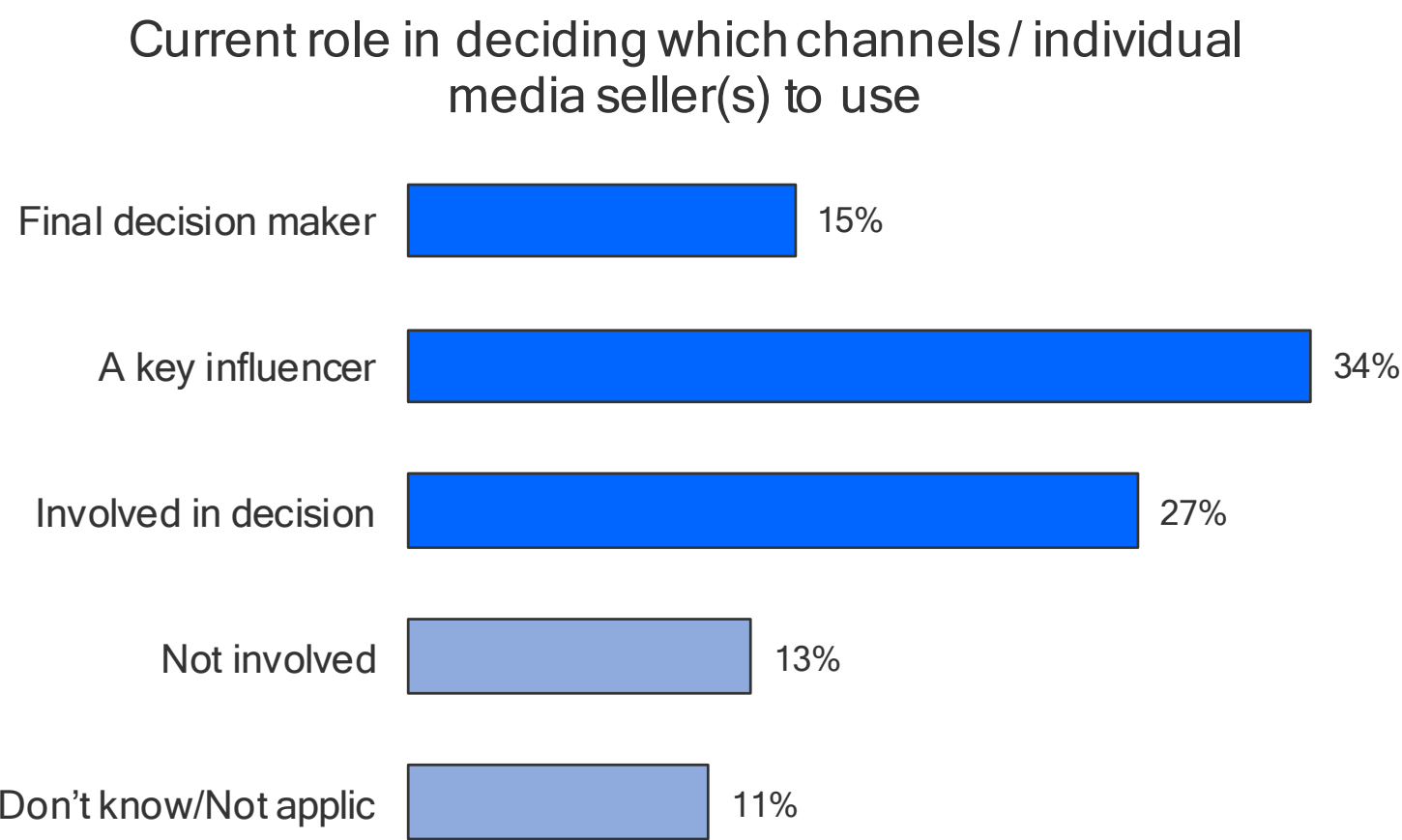
# Almost 60% Buy-Side – Key Decision Makers/Influencers

Survey distributed to all IAB Canada Members: In-field March 9-23, 2017  
Requested pass-along to relevant staff

Completed Surveys by IAB Canada Member Type



**Job Roles\*:**  
Legacy: 35%  
Digital: 65%  
(w'cross-over)



Note: Survey results are a reflection of only those members staff who choose to participate (i.e. not random). [Title Goes Here](#)

\* Calculation of percentages by legacy vs digital roles based on total # affirmative replies including cross-over job functions.



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# 2017 LBA Barometer Survey Findings

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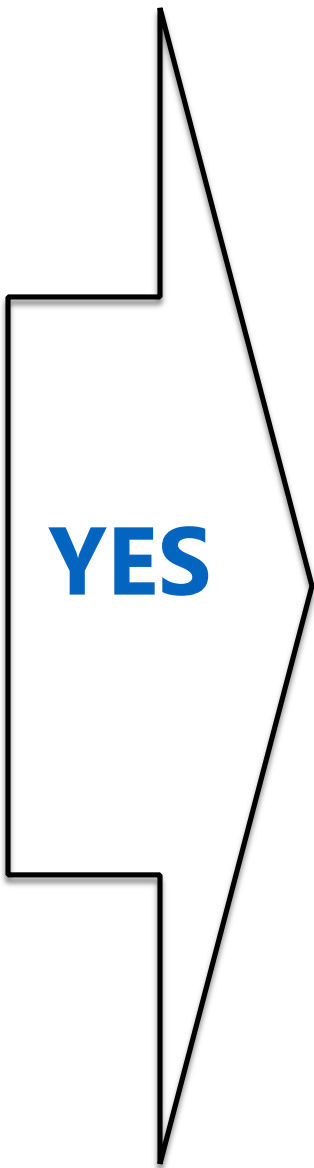
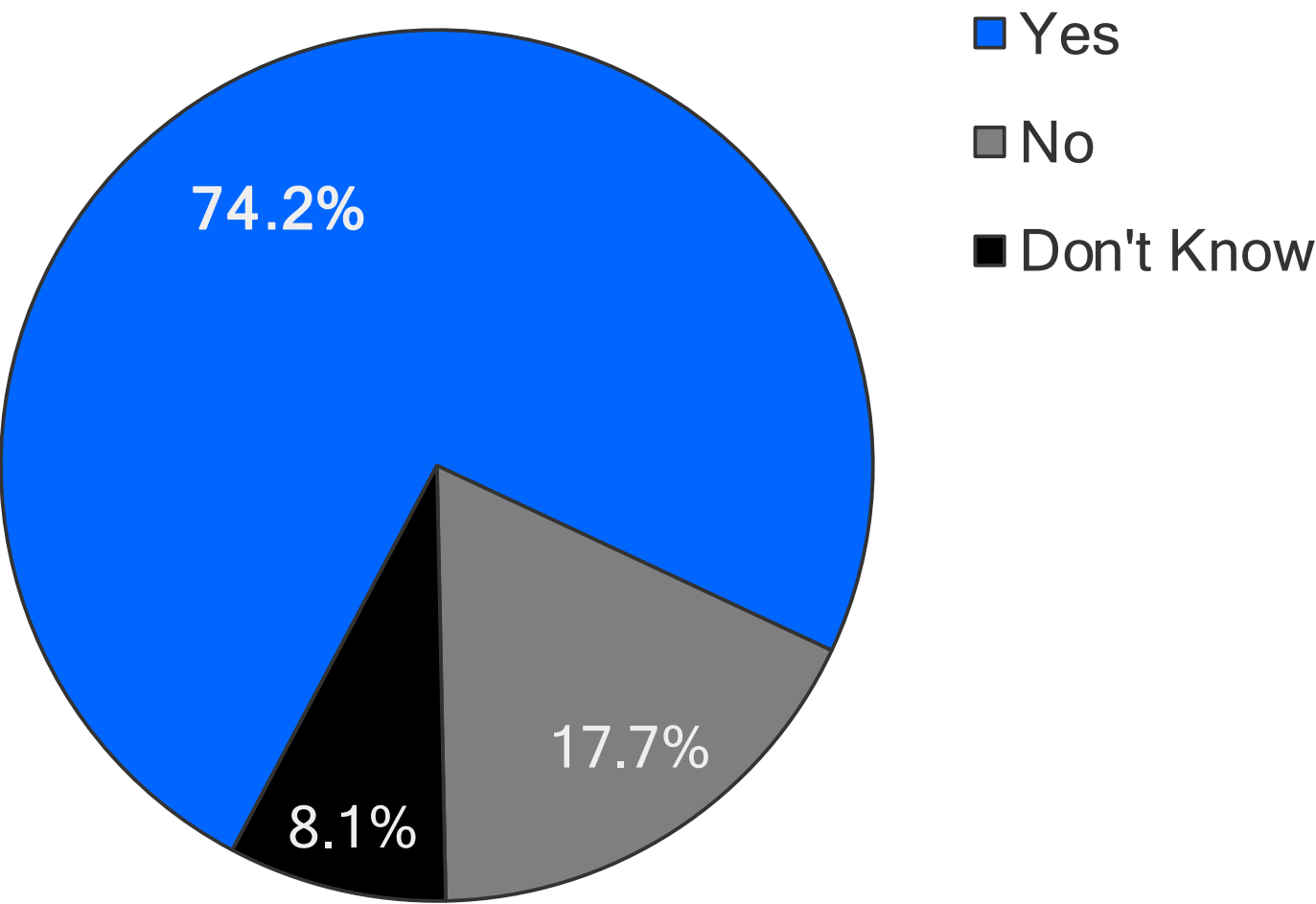
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# Digital OOH is Definitely a Thing...

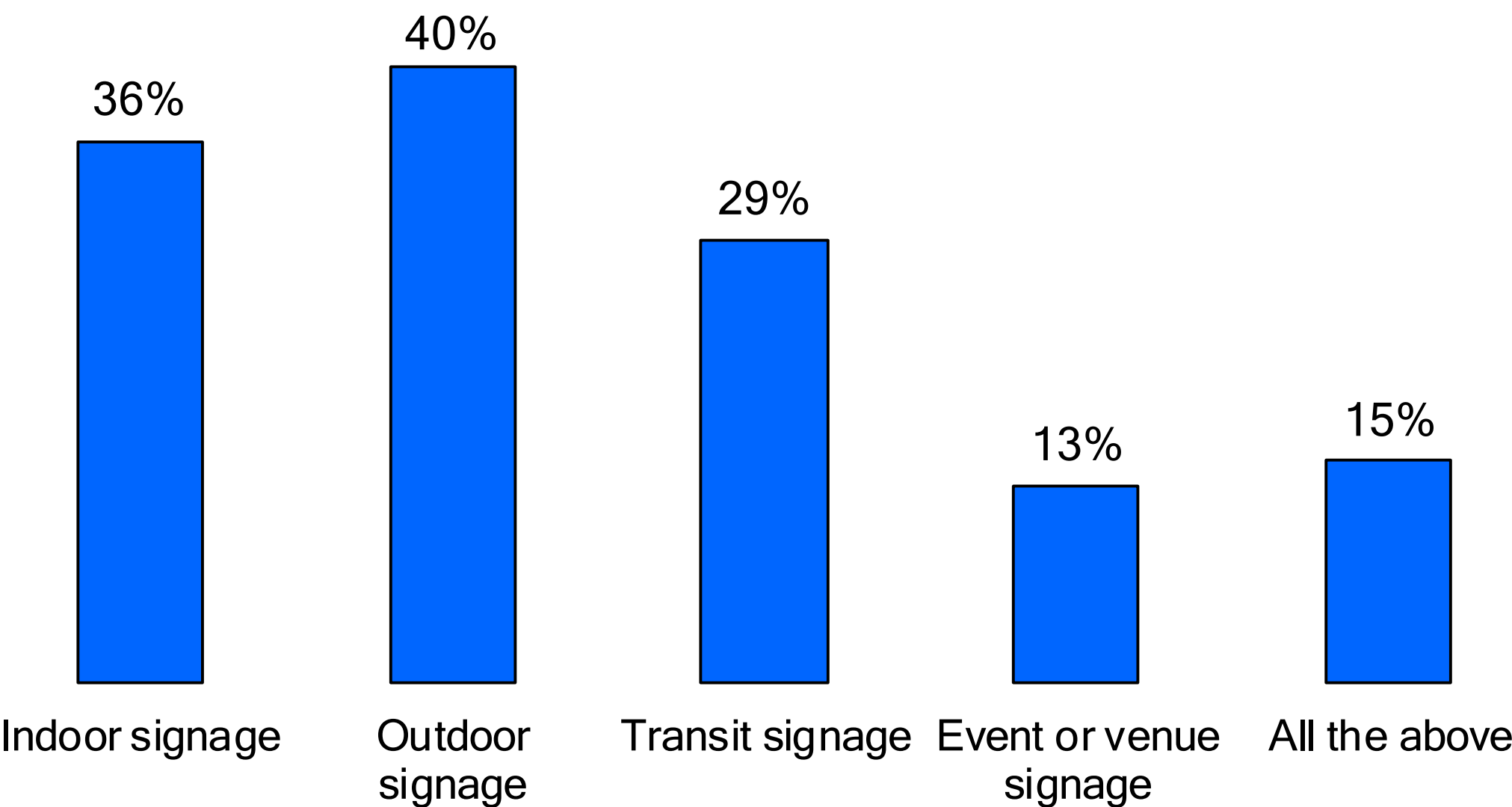
Three quarters of the sample work at companies that used Digital OOH in the past 12 months.

Indoor and Outdoor signage are most commonly used.

Has used Digital OOH as ad channel - past 12 months (me or my employer)



Types of DOOH Signage Used in the past 12 months



Sum of percentages exceed 100 because multiple answers were permitted.

# Barriers to Adoption – *Data & Validation*

Among the top 6 of 17 potential barriers, three principal ones to overcome are:

*By far the leading issue...*

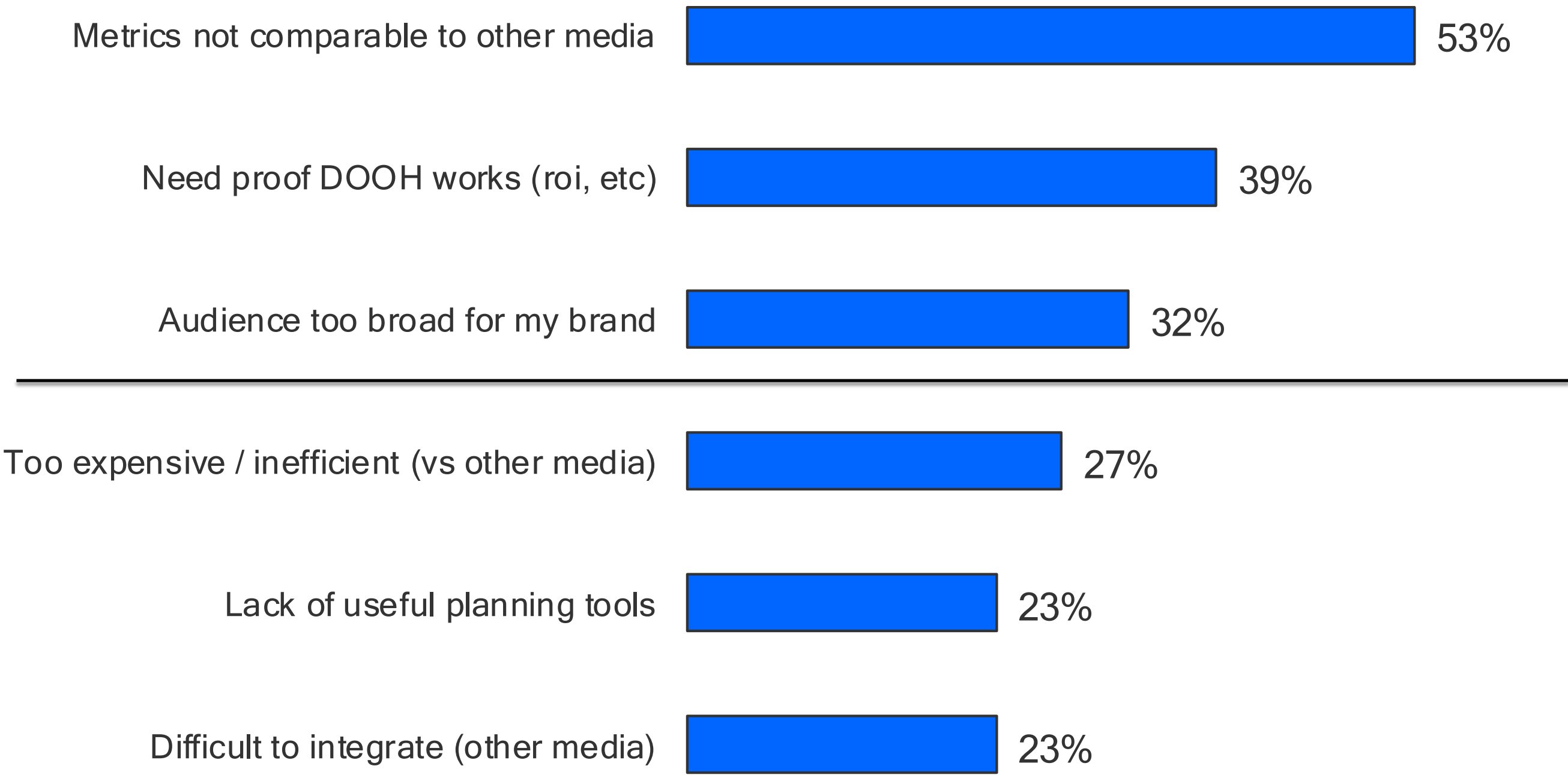
- DOOH metrics need to permit apples-to-apples comparisons to other media;

*Followed by...*

- Lack of cases/studies that demonstrate DOOH really works.
- Concern DOOH’s mass reach doesn’t provide the targeting some campaigns need.

*“Proof of performance really shoddy for all OOH (not just digital). Our clients deserve a high quality means of showcasing their ad campaigns”.*

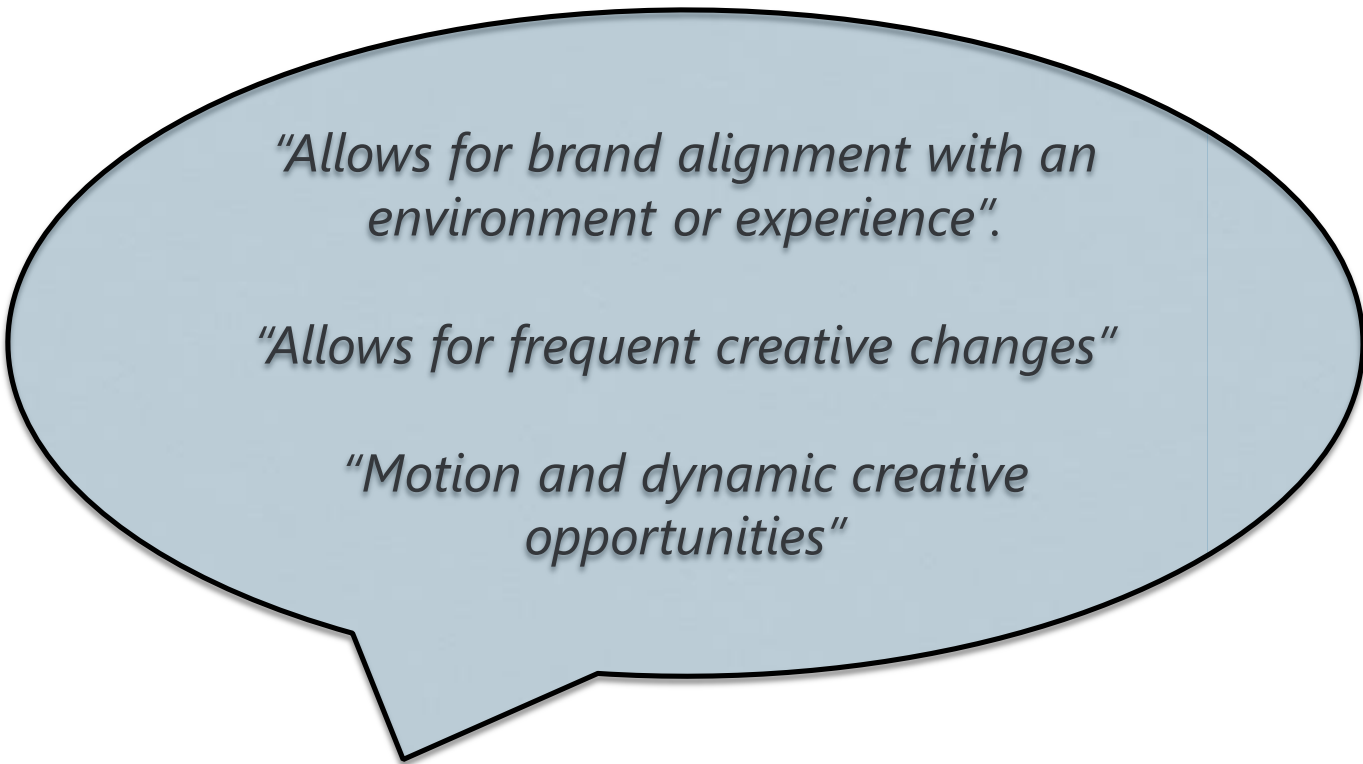
TOP-BARRIERS to adopting Digital OOH as a channel



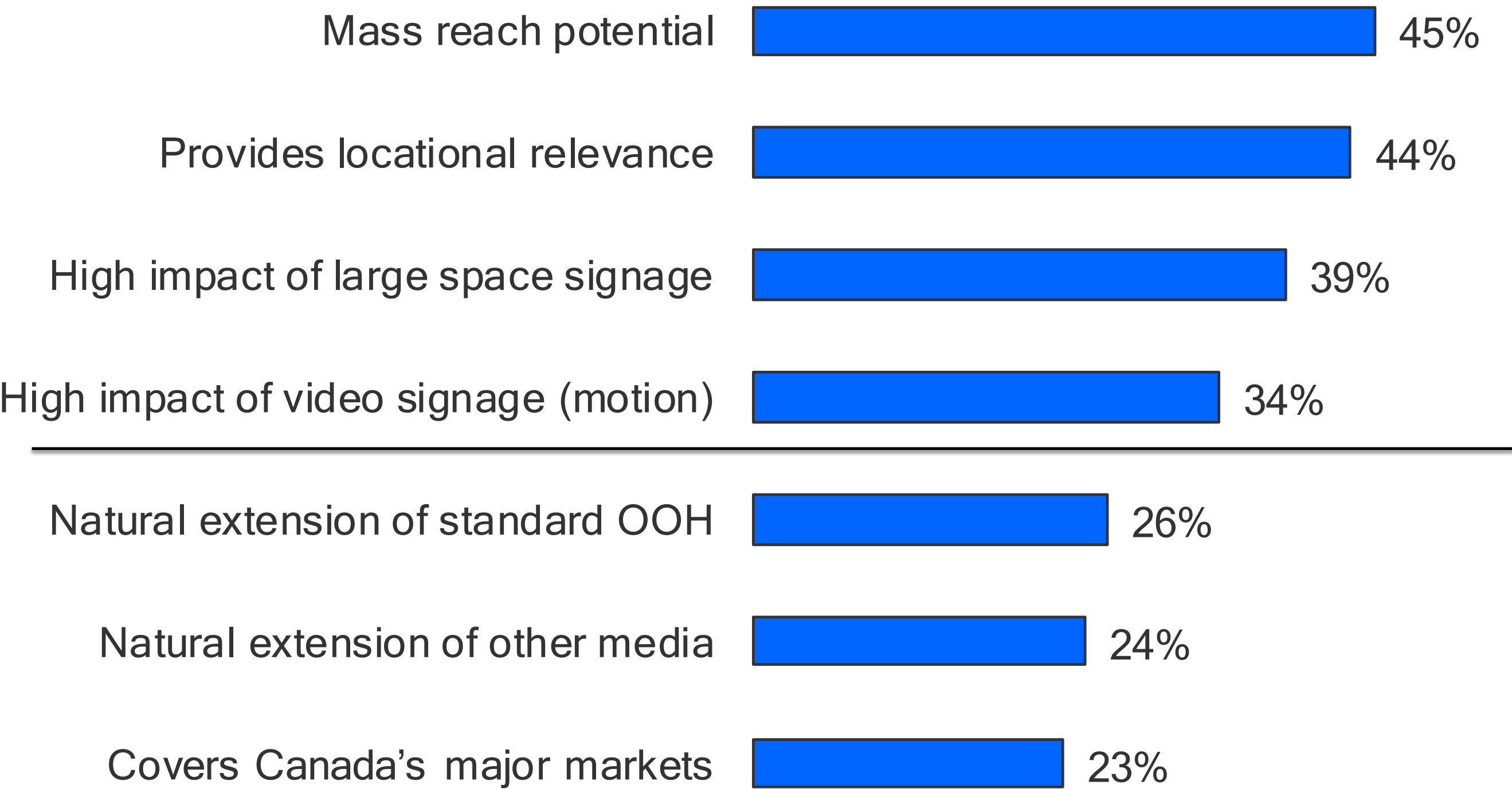
Sum of percentages exceed 100 because multiple answers were permitted.

# Top Motivators for DOOH Usage – Reach/Relevance/Impact

- Four of the top 7 reasons (18 ranked) to use the medium are especially important:
  - Mass reach potential,
  - Locational relevance (e.g. adjacencies to retail, attractions)
  - Impact of *large* space and *video* signage.



## TOP-REASONS for adopting Digital OOH in Campaign





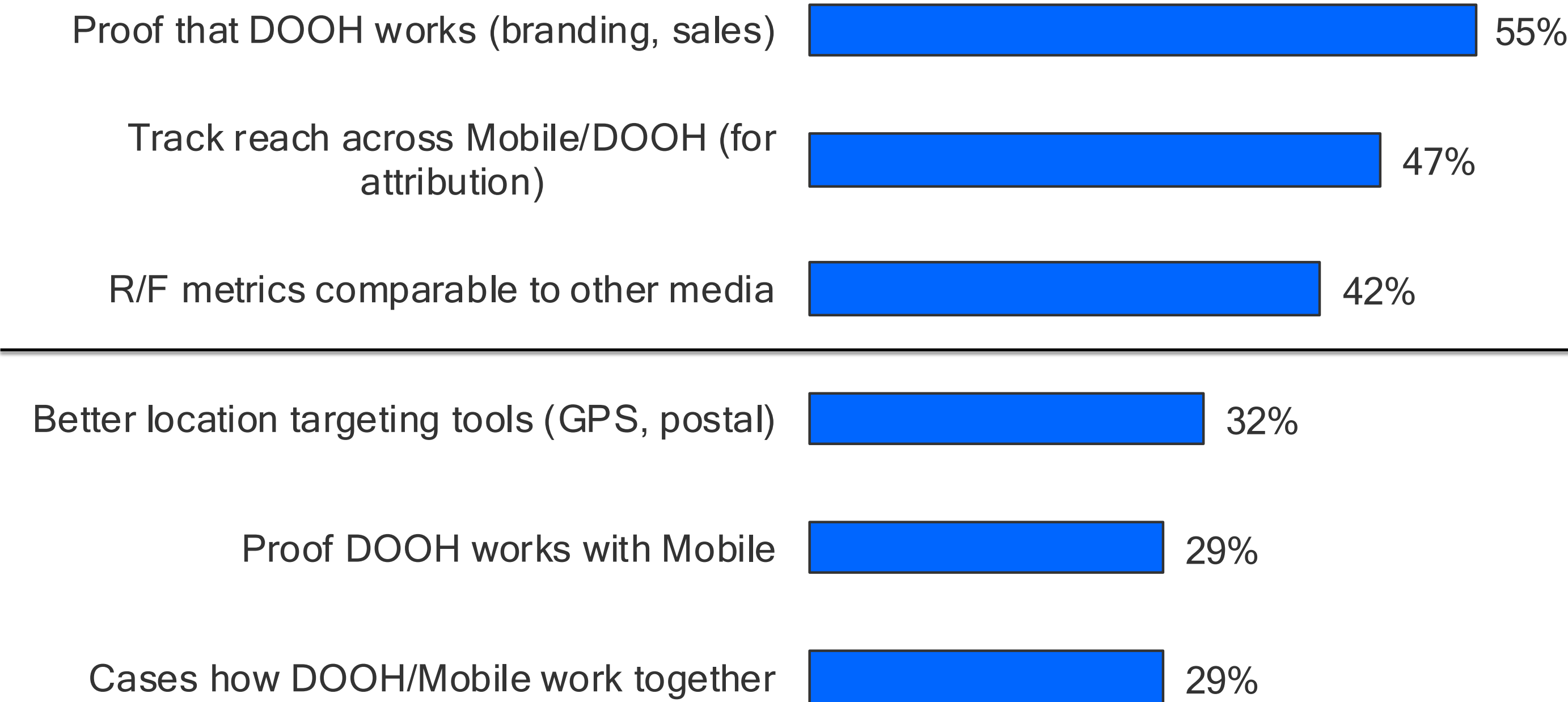
# Driving Adoption – Work to be done...

Among the top 6 (of 15 potential) Motivators, the DOOH industry must focus on achieving these three:

- Top-most - provide Proof that DOOH works on branding metrics and sales (also see barriers).
- Next - ability to track individuals across Mobile and DOOH, for net reach and attribution.
- Third - ability to compare DOOH R/F METRICS with other media; i.e. apples-to-apples.

*"More inventory outside major markets",  
"Less clutter and more efficient cost",  
Faster automated Buying workflow".*

TOP-MOTIVATORS of 1st time ADOPTION and larger Digital OOH BUDGETS

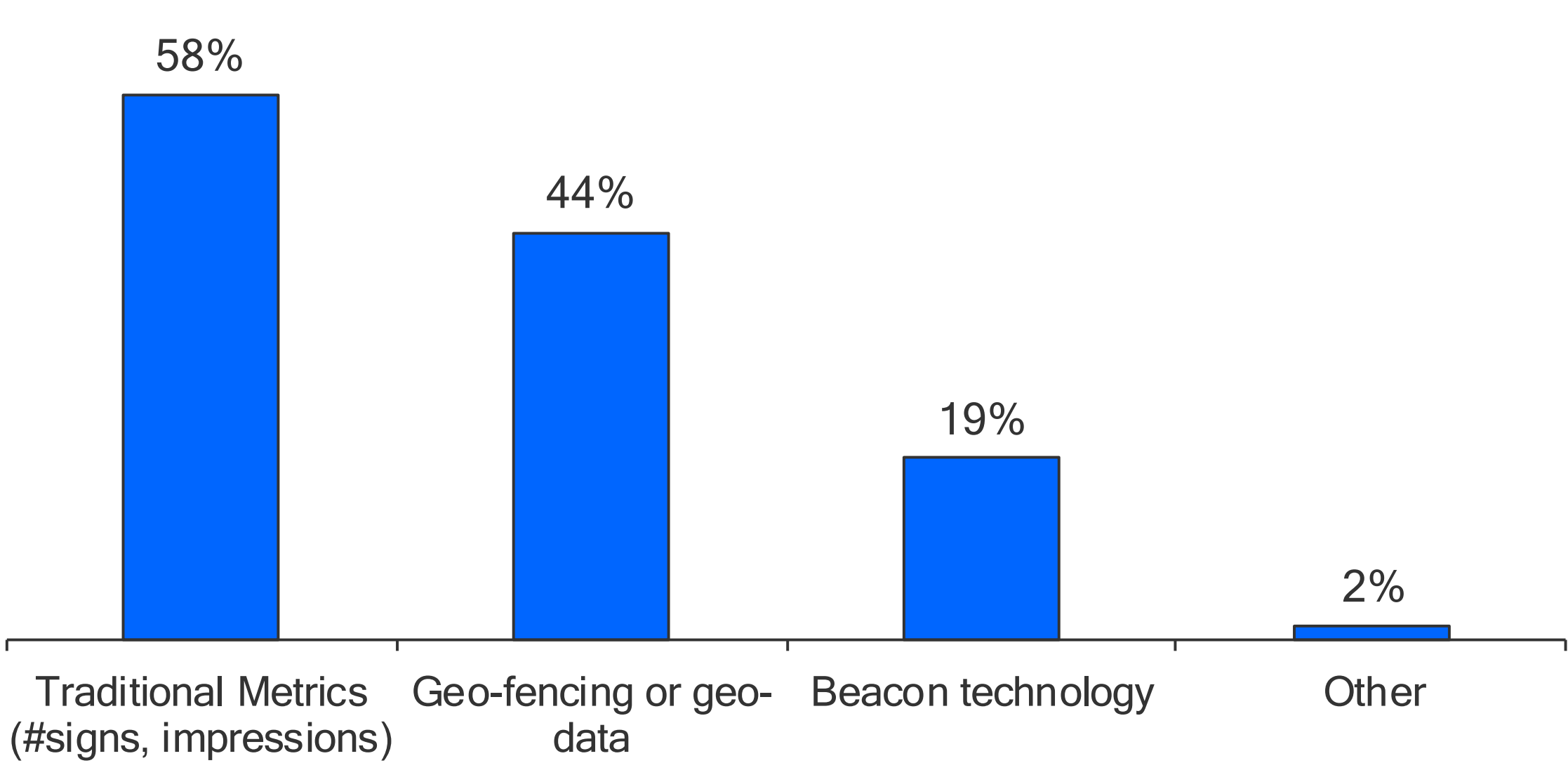


# A Thirst for Refined Metrics

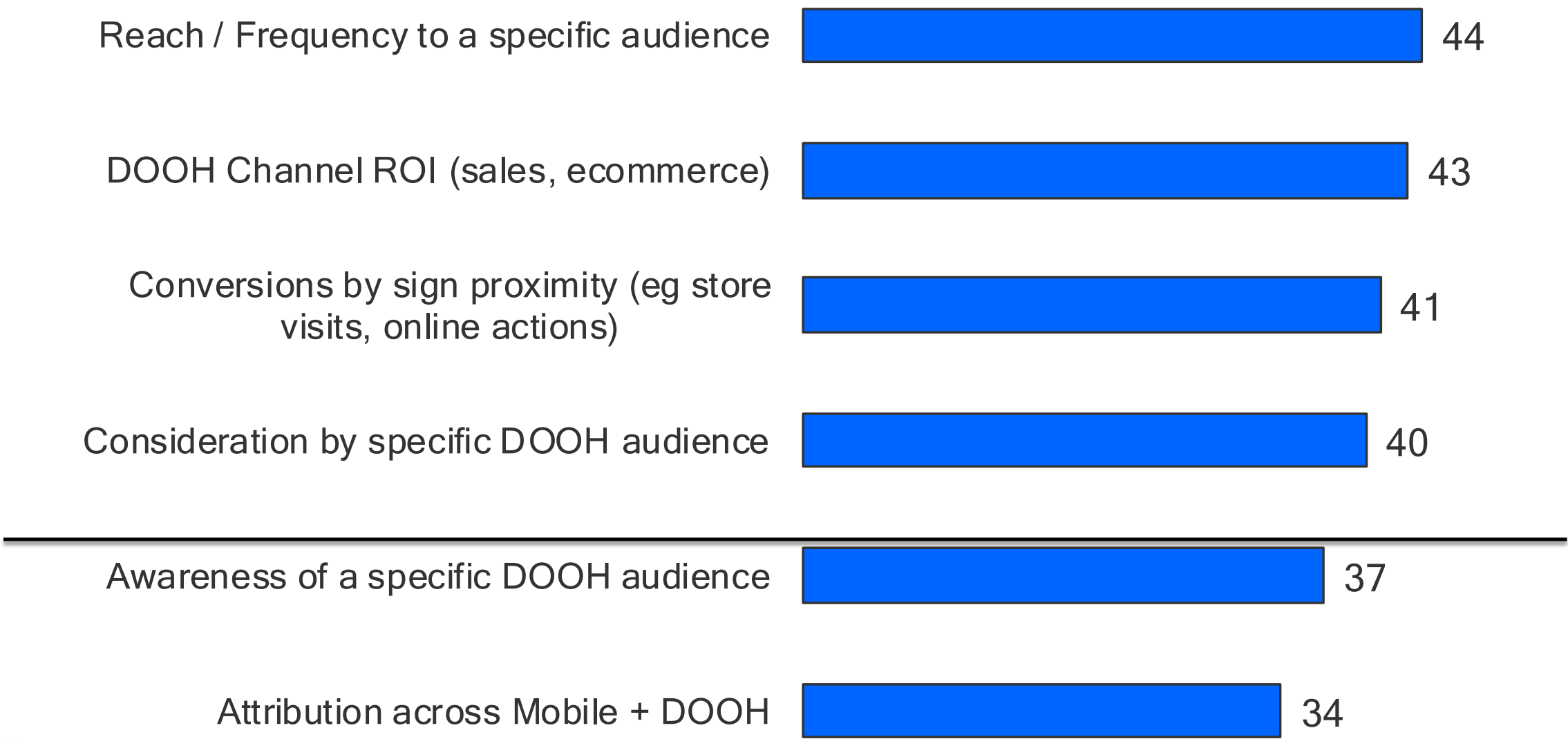
CURRENTLY Traditional Metrics like # SIGNS and IMPRESSIONS are most common to plan / execute DOOH, followed by geo-fencing/geo-data.

Targeted Reach/Frequency, ROI and Conversions by sign proximity lead the top 6 out of 12 Metrics considered most useful to evaluate DOOH success.

Data NOW in use to plan/execute Digital OOH



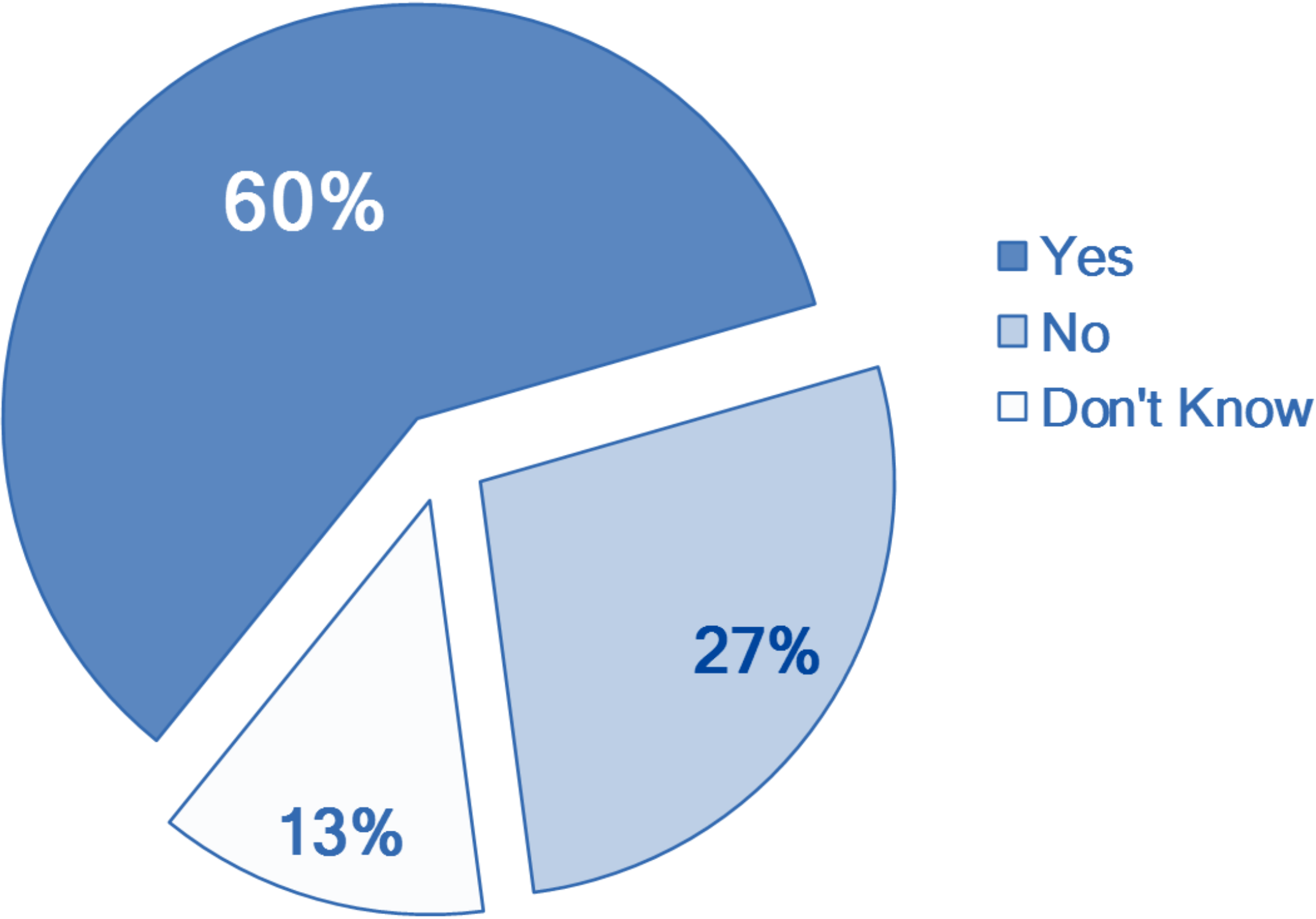
Most Useful FUTURE DOOH METRICS for evaluating Success (Useful: 4-5 out of 5)



“Layering data on DOOH buys to enhance targeting capabilities”.

# The Quest for Knowledge – Our Community Needs Training

High Interest in more TRAINING in Digital OOH  
Planning/Buying- e.g. geodata



## Key Findings - Summary

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**Adoption/Growth Barriers** ... Lack of Comparable Metrics or ROI Proof that DOOH works

**Top Reasons to deploy DOOH campaigns**...Mass reach potential, Location relevance, Large space, Video impact

**Drivers of greater Adoption**... Targeted Reach/Frequency and success metrics led by consideration, conversion and ROI





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