



IAB Canada

Barometer Report: The State of Digital OOH Advertising in Canada 2022

Member Survey Results: 5th Year

April 2022

Defining Location Based Advertising

Leveraging mobile and location data capabilities and delivering digital ads in various out-of-home environments.

Location Data



Social Local Events



Venue DOOH signage



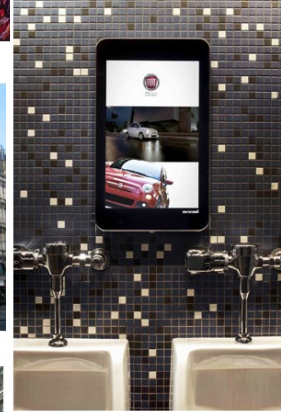
Indoor DOOH examples



Outdoor DOOH example



Transit DOOH example



Key Messages

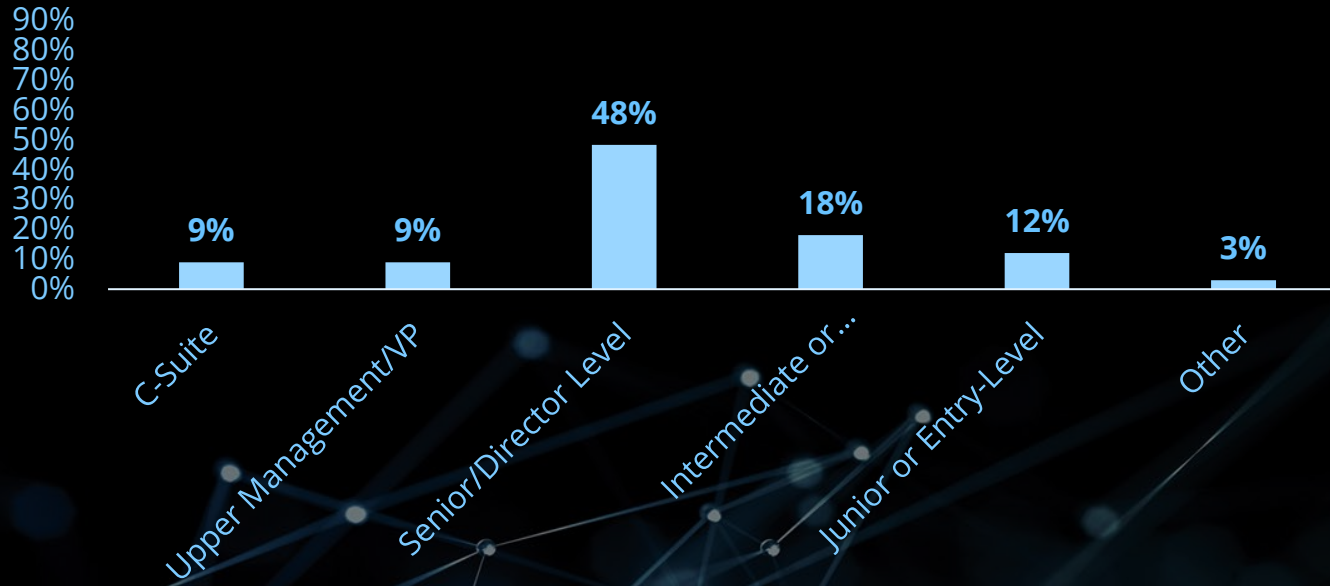
DOOH comes roaring back post-pandemic

- As we enter a post-pandemic era, the Out-of-Home space is seeing a resurgence in investment.
- There is a renewed sense of optimism within the space.
- DOOH shows promising creative opportunities, as data enhancements fuel both media and marketing strategies.

Barometer Respondents

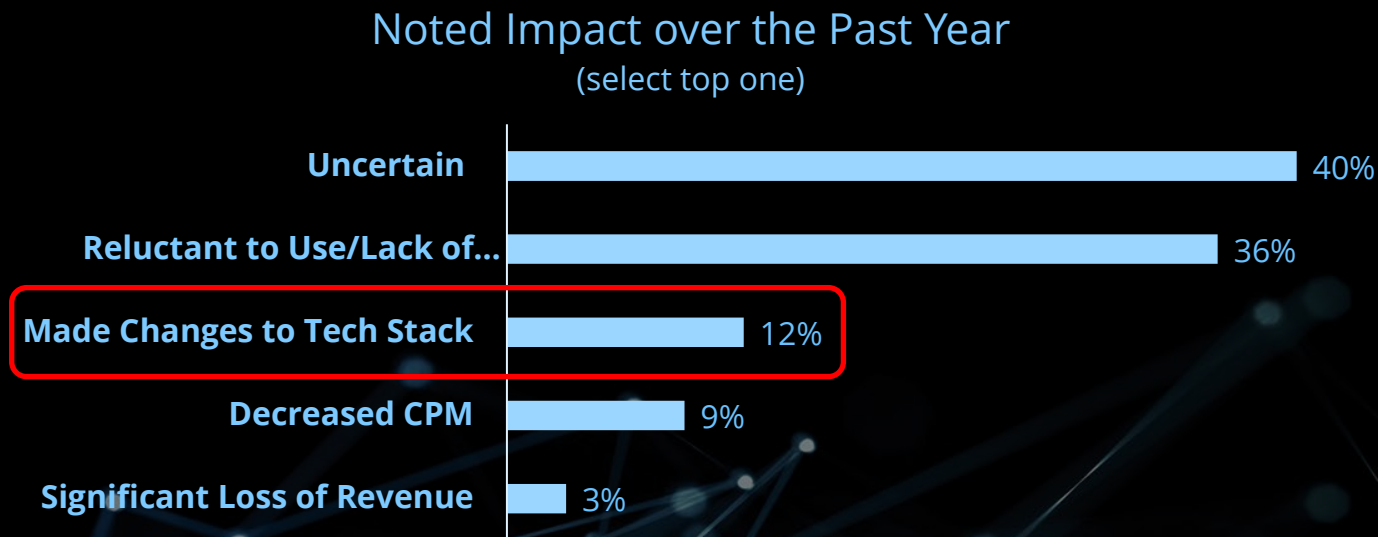
Almost 50% of respondents are senior level - half from the buy-side.

Respondent Profiles



General Sentiment on Cookie Independence

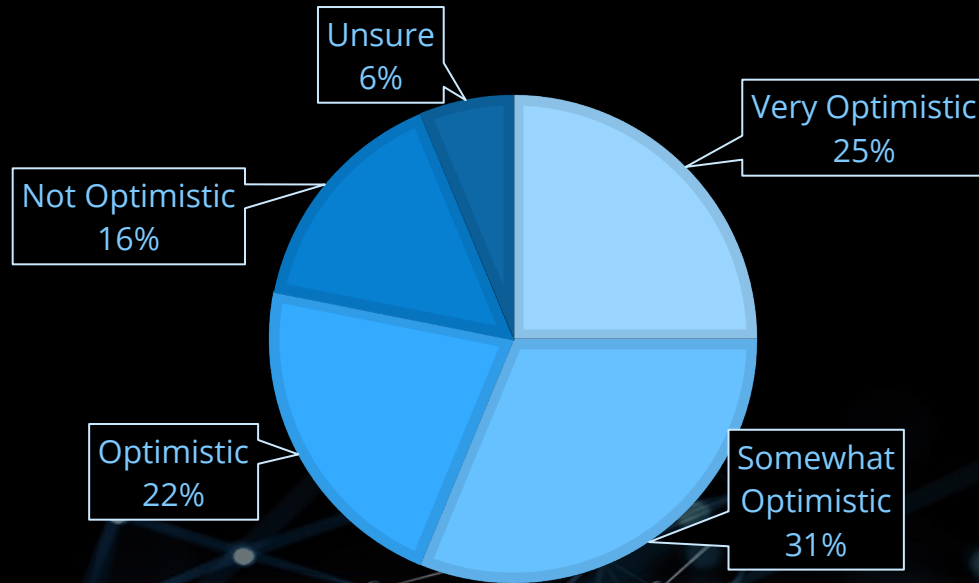
Uncertainty cast a shadow on the market, but change is afoot – the tech stack is evolving to accommodate.



Q: What is the most pronounced impact on having lost identifiers over the past year (select one)?

The Future is Bright: Location Data Remains a Viable Currency

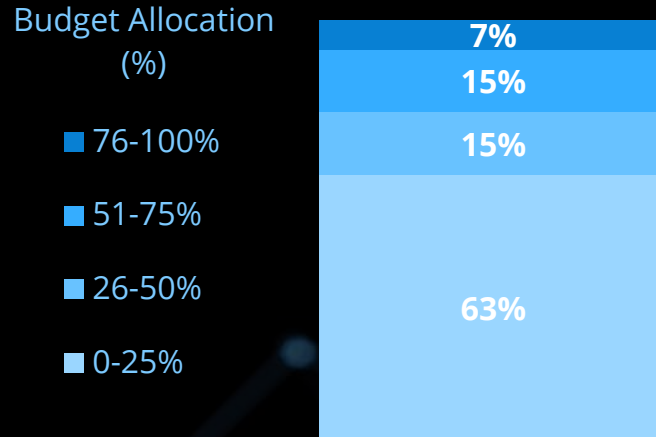
Despite the uncertainty, almost half of respondents are feeling optimistic overall, with a quarter feeling very optimistic.



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

Growth in Budget Allocations

Those looking to spend in DOOH are allocating more to the channel comparatively YoY.



2022: Anticipated Spend

Click to add

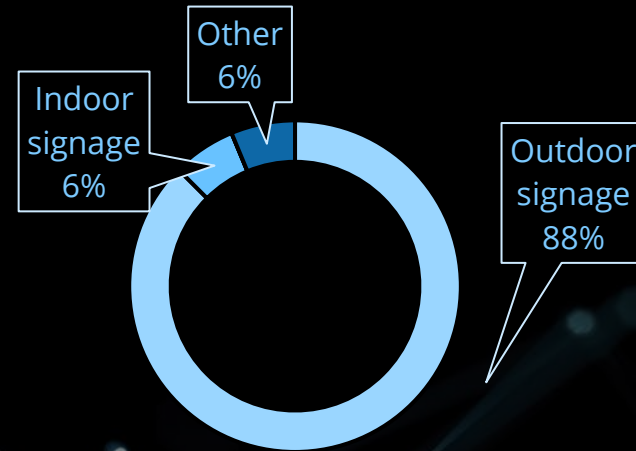
Q: When developing a media plan, what percent of the budget is/was allocated to DOOH?

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A Sign of the Times. Outdoor is Back.

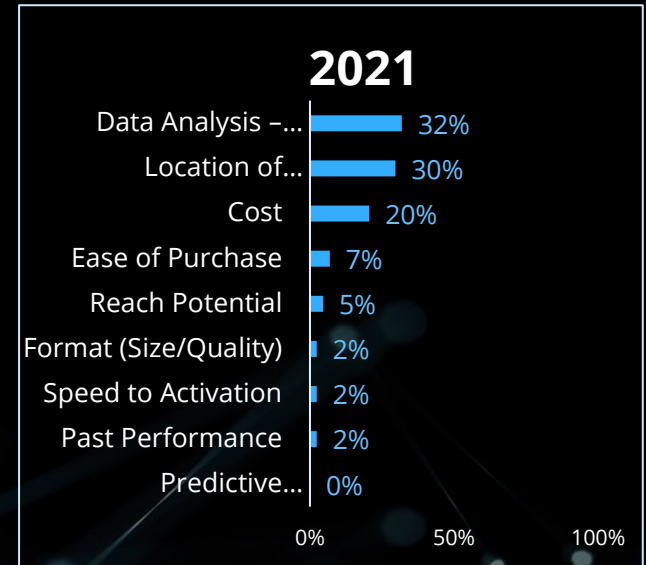
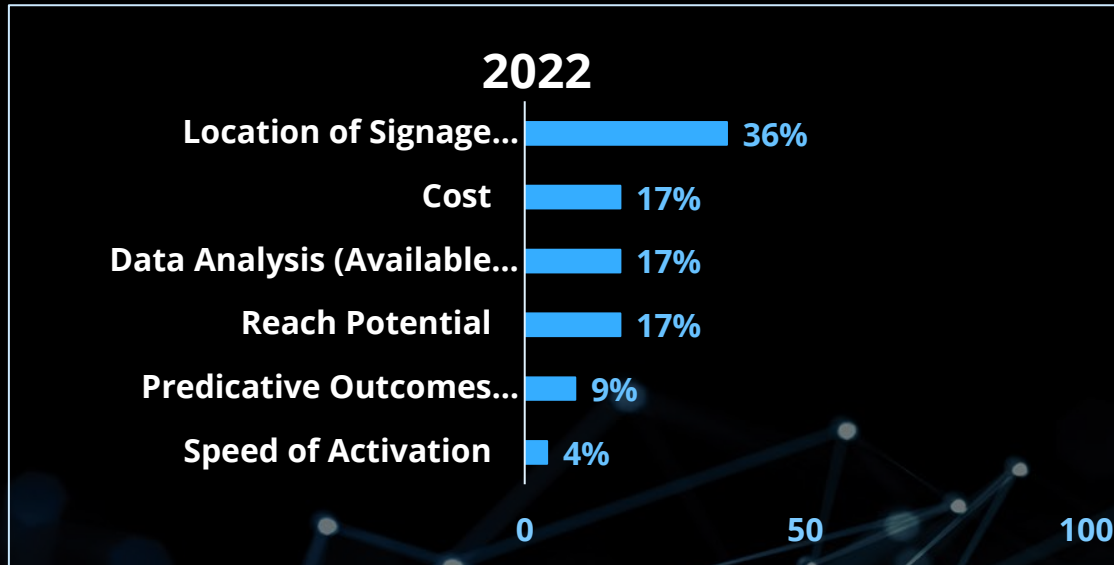
88% of the OOH investment was placed against Outdoor Signage – a rather dramatic transition year-over-year.

Where last year we saw expenditures being allocated toward Transit (23%) and Event/Venue locations (4%), the post-pandemic era is seeing a 200% increase YoY growth in outdoor signage (29% in 2021)



Most Important Factor When Buying DOOH

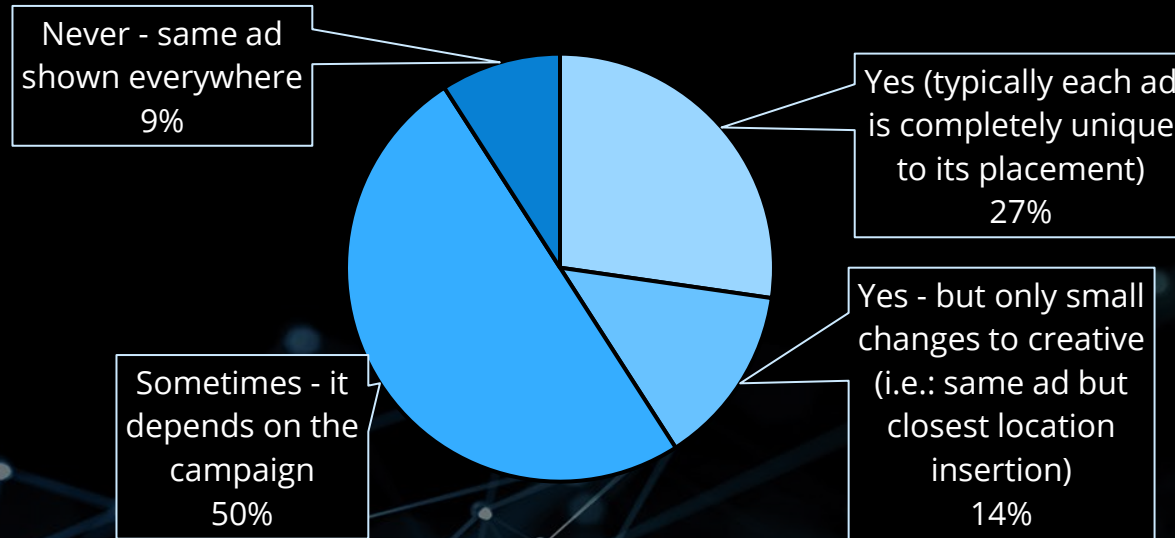
With some normalcy back in the Outdoor space, Location has taken its rightful position in strategic consideration (36%).



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

Leveraging Dynamic Ad Insertion

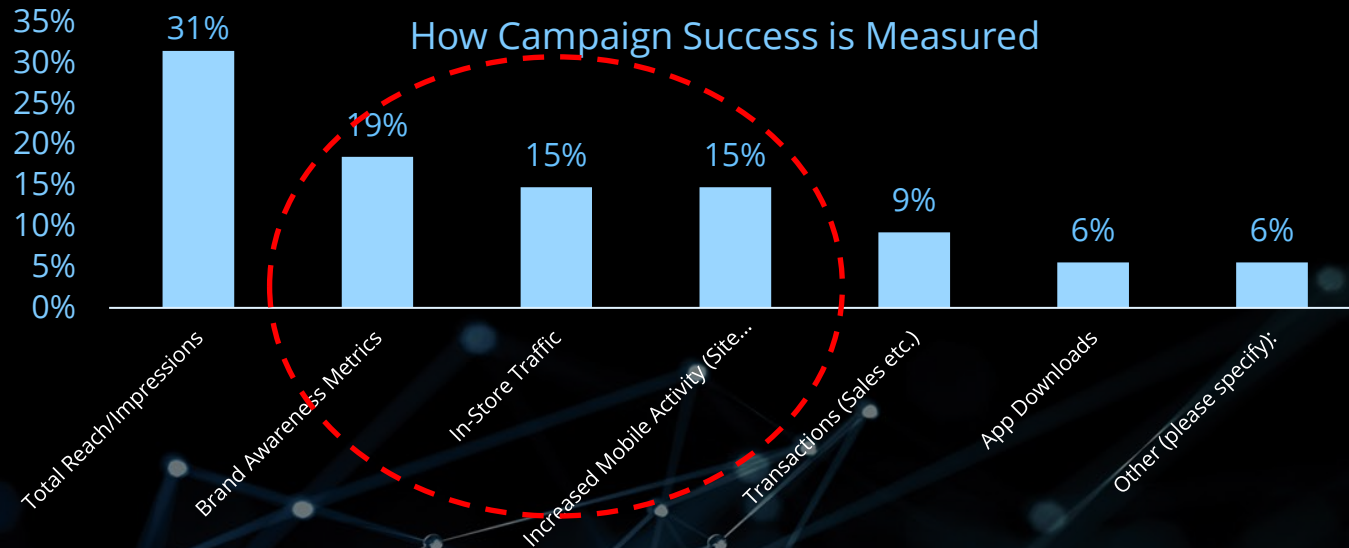
Over 40% report using DAI but 14% indicate only small changes to creative - not fully leveraging DAI technology for every ad. Personalization remains an untapped opportunity.



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?

Measuring Success

While 31% measure campaign success by Total Reach/Impressions, we anticipate a shift towards more sophistication as opportunities become more refined.



Q: When buying DOOH media, how is campaign success measured (select all that apply)?

Location Data in Action

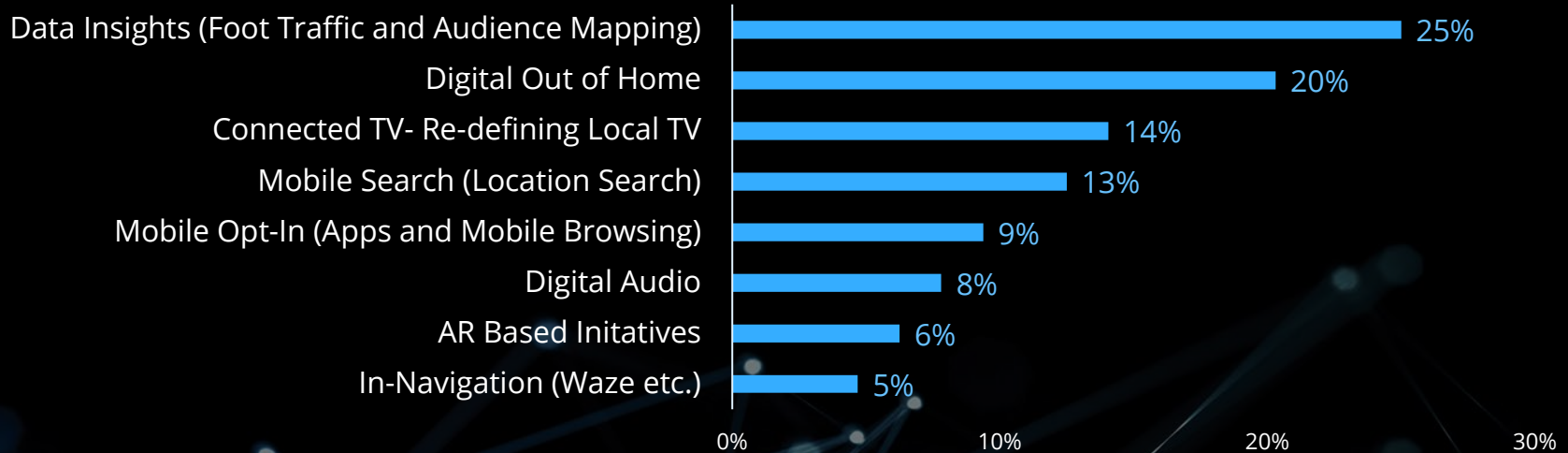
Opportunity to leverage enhancements within DOOH channel, along with informed creative messaging.

	Always/Essential	Regularly/Often	Sometimes	Never
Conquest from Competing Stores/Services	17%	31%	35%	17%
Enhanced DOOH Placements	24%	24%	31%	21%
Geo-Fencing (Understand Audiences in Certain Area)	20%	52%	21%	7%
Geo-Targeting (reach Audiences in Specific Locations)	28%	57%	10%	5%
Inform Creative Messaging	17%	21%	41%	21%

Q: How frequently do you use each of the following to enhance your location-based marketing initiatives?

Data Insights Holds the Greatest Promise for LBA

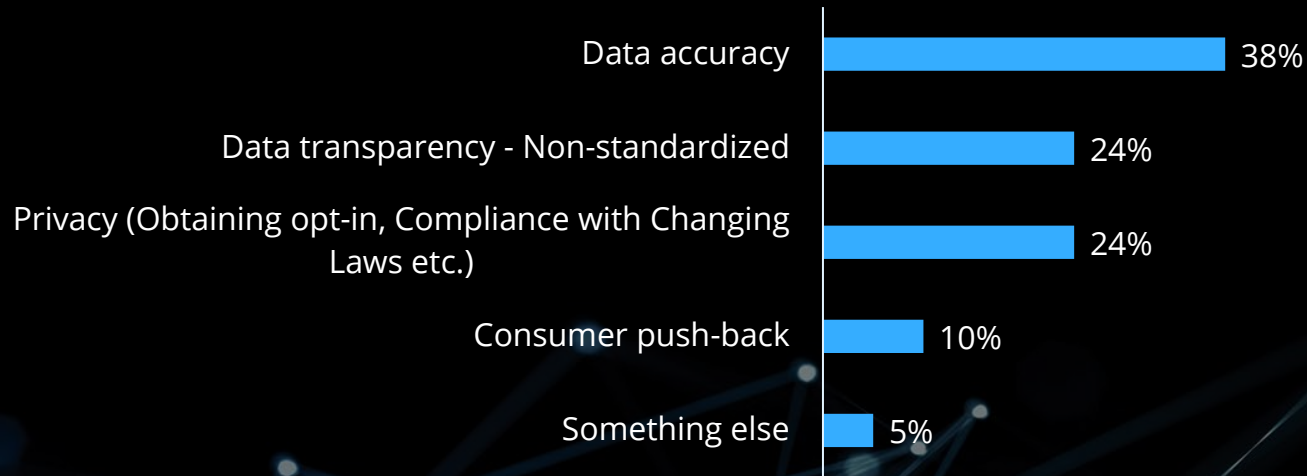
25% of Respondents are eager to explore foot traffic and audience mapping, followed by the DOOH space overall.



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

What Challenge Lies Ahead?

Data accuracy and transparency nudge themselves back into the top two spots of greatest concern for respondents, as privacy moves out from being the top priority (2021).



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

Foot Traffic and Transparency - The Next Big Thing



Q: What do you see as the next best thing in location-based advertising?

Summary of Findings

Location Based Advertising holds promise and untapped opportunities

- Some **uncertainty on the implications that Cookie Independence** but the industry is **generally optimistic** about location data being a viable currency for reaching addressable audiences.
- **Preparations** are taking place - some are preparing by changing tech stacks.
- The sector is in recovery **more of the marketing budget is being placed into the channel.**
- **Outdoor signage** is following foot traffic – as we get back outside signs are re-appearing.
- Top priority for advertisers is **location of signage.**
- Untapped opportunities to **leverage DAI technology** to inform creative messaging.
- **Anticipate sophistication behind measurement** will evolve how success could be measured, moving beyond impressions.
- **Data Insights: foot traffic and Audience Mapping** cited as a major growth opportunity, as data accuracy and transparency remain on industry's mind.

Thank you for Supporting IAB Canada

Powerful Digital Leadership